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SAN FRANCISCO

downtown zoning study

C-3 AND ADJACENT DISTRICTS

WORKING PAPER NO. 1

January 1966

DEPARTMENT OF
CITY PLANNING
100 Larkin Street
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Preface

This document is the first of two Working Papers of the Downtown Zoning Study written as the study progresses. It describes the work of July to December, 1965, the first six months of the study. These Papers are not final reports, but are designed to provide a basis for execution of further phases of the work, and for review and comment by interested persons as an aid to the study.

This first Working Paper contains sections on the characteristics and requirements of space use and activity in the downtown area, urban design aspects, a compendium of goals and issues for downtown, and a statistical Appendix.

The second Working Paper, to be written toward the end of the study, will contain material on the economic and technical aspects of building development, construction and operation, further analysis of design aspects, additional information on traffic and parking, a summary of downtown zoning techniques used in other cities, and detailed zoning evaluations for San Francisco.

A final report will be produced after the completion of the study in July, 1966.

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APPENDIX

List of Maps and Tables

This Working Paper describes the first six months' work in the Downtown Zoning Study, which is designed to produce improved zoning standards for the downtown areas of San Francisco.

Delineation of Downtown

There are a variety of ways of describing the boundaries of the downtown portion of San Francisco, used for many different purposes. The designations most frequently encountered, as used in this paper, are as follows:

1. The Downtown Zoning Study Area. This is the broad area embraced by the overall maps and statistics of the present study. Its boundaries are The Embarcadero, Vallejo Street, Franklin Street, the Central Freeway, and Bryant Street. The area is nearly identical with that covered by the Downtown General Plan published in 1963, and sets the outer limits of the portion of the city in which downtown functions are carried on. The Study Area is the smallest area in which the relationship between the various downtown functions can be understood, and the smallest area in which planning for traffic circulation in the downtown area can be performed.

2. The Central Business District, as defined by the U. S. Bureau of the Census. This is an area, established for every major city, which is designed for the collection of statistics concerning the high-activity central commercial portion of the city. The Central Business District as defined for San Francisco, though its current boundaries were established with the aid of a local committee in 1955, is somewhat arbitrary due to the need to follow Census Tract boundaries. This area is considerably smaller than the Downtown Zoning Study Area.

3. The Downtown Core. The Core is a still smaller area, composed of the parts of the downtown in which the most important central functions are located. First there is the concentrated part of the Financial-Administrative District, centered on Montgomery and Sansome Streets and including roughly 25 blocks. To this may be added the main retail area south and east of Union Square with approximately 12 blocks more, and much of the Hotel-Entertainment District west of Union Square with about 18 blocks. Beyond these areas in the Core there are blocks with similar but lesser development and at least a dozen other distinct functional areas making up the balance of the downtown.

The functional areas used in the Downtown Zoning Study are essentially those outlined in the 1963 Downtown General Plan, although in some cases, for statistical purposes, boundaries have been altered to follow streets rather than splitting blocks. A map showing these statistical functional areas, the Census Central Business District and the Downtown Zoning Study Area is contained in the Appendix to this Paper.

4. The C-3 Zoning District. Although this district is labeled the "central business district" in the City Planning Code, its boundaries do not correspond to any other downtown delineation. The mapping of the C-3 District was adopted by the Board of Supervisors in 1959, and it has since been expanded slightly at its edges by a series of six map amendments. A major consideration in these amendments, as well as in the original mapping of the C-3 District, was the exemption of C-3 properties from the off-street parking requirements applicable in all other zoning districts, as well as the far greater amount of building floor space permitted for C-3 sites.

The C-3 District in its 377 acres covers a variety of downtown functional areas but by no means all of them, and it cannot be considered a meaningful area for present study purposes. The Downtown Zoning Study Area, in fact, is approximately three times as large as the C-3 Zoning District. As is evident from these definitions, the term "downtown" itself refers generally to the overall area included in the Downtown Zoning Study Area and thus has far greater reference than the terms Census Central Business District, Downtown Core and C-3 Zoning District.

Influences upon the Shape of Downtown

As in other cities, the shape of downtown San Francisco has been greatly influenced by topography and forms of transportation. The earliest development was at the waterfront in the vicinity of Montgomery and Kearny Streets. Later the waterfront was moved eastward by filling, making more flat land for downtown development, and the coming of the cable car made possible an expansion up Nob Hill. When Market Street became a major traffic street the most intensive development spread out along that spine, reaching toward the Ferry Building and toward the Civic Center built near Van Ness Avenue. This same pattern of development was restored after the 1906 Fire.

In the 1920's, with choice sites along Market Street already built up and the automobile coming into wide use, office construction spread away from the spine and tall apartments began to dot Nob Hill. Finally, in the period of rapid construction which has characterized the past ten years, new buildings have been scattered, filling in existing gaps in downtown development and making more distinct than before the functional areas devoted to offices, retail, hotel and other activities.

Through all these years the original influences of topography and transportation forms, though shifting, have continued, and in several years the coming of rapid transit is expected to have a new effect upon the shape of downtown.

Zoning for the Downtown Area

When the first zoning standards became effective in San Francisco in 1921, there was no great concern as to the character of downtown development, and all of the downtown area from the south side of Market Street to the slopes of Nob Hill was placed in the single Commercial District that existed under the 1921 City Planning Code. Nob Hill itself was zoned Second Residential, and the South of Market area Light Industrial, with Light

Industrial zoning also found north and east of California and Montgomery Streets and in the Van Ness Avenue area. There were some restrictions as to the types of uses permitted in all these districts, but except for coverage and rear yard standards made applicable to some properties in Second Residential after 1946, there were no controls on the size and density of buildings. Off-street parking requirements for residential structures became effective in 1955.

During the period from 1947 to 1959 a new City Planning Code was in preparation. When it finally became effective in 1960, this Code continued most of the former general breakdown of residential, commercial and industrial sections of the downtown area, with the former Commercial District area and much of the former Light Industrial area north of Market Street zoned C-3. The only standard enacted for the C-3 District, other than as to uses and off-street loading, was a ratio of the maximum floor area in a building to the land area occupied by the building (floor area ratio, or F.A.R.) of 20:1, with 25:1 permitted for corner lots. The City Planning Commission had proposed substantially lower floor area ratios for the C-3 District, and had finally recommended a maximum of 16:1.

After the 20:1 ratio had been in effect for a short time, renewed public interest in the effects of high intensity downtown development led the Board of Supervisors in 1964 to reduce the maximum floor area ratio to 16:1, with 20:1 for corner lots. At the same time, the Board and the City Planning Commission recognized the need for a full study of new zoning standards to be recommended for the downtown area, and such a study was authorized to begin on July 1, 1965.

A New Era for Downtown

Since the period of public consideration in the 1950's of the City Planning Code now in effect, downtown San Francisco has experienced profound changes, and a continuation of this period of change is anticipated in the coming years. Among the changes are the following:

1. The shape of the region and the role of the city in the region are becoming more certain. Regional planning for the Bay Area has begun in earnest, and San Francisco can be fitted more precisely into the regional pattern.

2. The directions of downtown development are becoming more clear. New construction, at first bottled up by the Korean War, has burst forth and pointed to the future character of downtown. Much of the prevailing uncertainty described by the first report of the Department of City Planning on downtown planning in 1955 (significantly titled Modernizing Downtown San Francisco) has been removed.

3. More specifically, the direction taken by each of the downtown functions has been clarified:

   a. Following national trends and asserting a regional dominance, the financial and administrative functions have shown the greatest growth, intensifying at the center of the office district and expanding at its edges.

b. Retailing has held its market well, somewhat in contrast to other central cities, with downtown stores moving further toward specialization while building outlying branches closely tied to downtown headquarters.

c. Hotel and entertainment functions have strengthened, based upon increased convention and tourist business. There has been an increasing emphasis upon facilities capable of handling automobiles.

d. Downtown residential facilities continue to provide for upper income and single persons, but with a leveling off in high-rise luxury construction, stagnation in the Midtown residential area, and continuing deterioration of housing in the South of Market industrial and heavy commercial areas.

e. Institutions, as in other central cities, have tended to develop more in outlying areas than downtown, except where anchored to the downtown for special reasons, as in Chinatown.

f. Government offices, growing with State and regional population and more complex government functions, have further clustered in new facilities in the Civic Center.

g. Utilities have tended to expand for the same reasons, and have built or planned new facilities in the downtown area, particularly south of Market Street where land is readily available.

h. Industry has followed national and California trends in moving away from the downtown area, except for certain activities which directly serve the downtown area or depend upon a special labor pool. To some extent this is also true of wholesaling, storage and distribution.

i. A marked changeover has occurred in one formerly industrial and warehouse area --Jackson Square --which has become predominantly a home furnishings wholesaling area.

j. Automotive sales in the Van Ness Avenue area have further dispersed to outlying areas, providing opportunities for other types of development in that area.

k. Large scale cultural facilities have been at least temporarily rejected for the Civic Center and South of Market areas, reopening the possibilities for such facilities in the traditional hotel and entertainment area west of Union Square or elsewhere in the downtown area.

l. Parking garages have been added, particularly at the periphery of the Core where they can serve to intercept incoming traffic before it reaches congested streets in the Core.

4. Publicly assisted redevelopment has gone into execution in the downtown area. The Golden Gateway project relocated the wholesale produce market out of downtown and provided land for expansion of the office district

and for close-in apartment towers. The Yerba Buena Center project in the South of Market promises further development in a depressed area adjacent to the Core.

5. In transportation, a regional rapid transit system is now being built, setting a pattern for future transportation in the Bay Area and providing incentives and opportunities for the planning and improvement of Market Street. Freeway planning may soon reach a point of resolution, vitally affecting the downtown area. And the Municipal Railway and Department of Public Works are now carrying on studies of local transit and traffic and parking which will contribute to the formation of comprehensive transportation policies.

6. The Downtown General Plan was published by the Department of City Planning in 1963 to provide a broad framework for the consideration of downtown directions and problems. Building on the 1955 report, Modernizing Downtown San Francisco, the General Plan report described the form and major attributes of the downtown area, delineated the functional areas, outlined circulation needs which emphasized the spiraling problems created by the automobile, recommended locations for new off-street parking facilities, outlined general design considerations and proposals, and recommended a number of public improvements, some of which are presently being carried out.

The Downtown General Plan recommended an intensive study of downtown zoning as a separate work project, to include the question of overloading of congested areas with buildings of high bulk, the possibility of bonuses for such features as plazas and arcades, standards for residential development, parking standards, height limits for preservation of Jackson Square and Chinatown, height limits to assure maintenance of light and air to downtown squares, and standards for the control of signs. A sign ordinance and some of the height limits have since been enacted; all other downtown zoning elements are now being considered in the present study.

7. Above all, during the past ten years, there has been an ever increasing awareness of the need to attend to problems in the downtown area in order to assure a high level of development, increase convenience, particularly in the movement of persons and goods, and protect community values. It is recognized that there must be an emphasis upon what is desirable in downtown development, as well as what is necessary, and that what may seem only desirable in the short run may indeed be necessary to the long-run health of the downtown economy. It is in the spirit of this awareness that the Downtown Zoning Study was put under way.

The task of the first six months of the Downtown Zoning Study has been to set the framework, through collection and analysis of information on the downtown area, upon which may be based the detailed zoning evaluations and recommendations which will be the ultimate product of the study. The resulting framework is as follows:

A. GENERAL CONSIDERATIONS

1. The principal objective of this study is to seek means of maximizing downtown development consistent with community values and efficient organization of functions. Intensity of downtown development means economic and social vitality. There are additional goals for downtown having to do with broad and enduring values and with a harmony which cannot be achieved without planning. This study must therefore develop all the means available through zoning to direct development toward an optimum based upon a balancing of all recognized downtown needs.

2. The functional areas breakdown in many cases provides significant guides to the selection of zoning standards. Examination of conditions prevailing in other American cities discloses that San Francisco is somewhat unique in its present arrangement of relatively distinct and compact areas devoted to specific downtown functions, and these areas are comparatively well related to one another. This arrangement has many advantages, and it should be further encouraged.

Work carried on in the Downtown Zoning Study has borne out the general delineation of functional areas established in the 1963 Downtown General Plan. In San Francisco, this type of delineation is far more significant to downtown planning than the conventional "core and frame" or "core and fringe" designations often worked out in other cities by elaborate statistical means. Because of special features of historical development and topography, the "core" of downtown San Francisco is best understood in terms of the functional areas which comprise it, and there is currently no full-blown "fringe", characterized by blight and low intensity of uses, except in the vast South of Market area. Study of the downtown area in San Francisco must proceed directly in terms of the nature of the functional areas, their boundaries, and the relationships among them.

One attribute of the functional areas which is an important determinant of their size, location and character is the movement of pedestrians. In downtown San Francisco it is important that people be able to accomplish most of their related purposes on foot. There is therefore concern as to the linkage of downtown functional areas and the establishments within them in a pedestrian framework with feasible walking distances, and this concern has significance to zoning.

In the drafting of zoning standards there are several types of standards to consider. Zoning is concerned with the uses to which property is put, the height and bulk of structures, the provision of open spaces, off-street parking and loading, and the smooth transition between areas having contrasting characteristics. The text of the ordinance applies in terms of districts on a map, but the total number of districts that may be established is not legally limited, and each concept and standard can be varied according to district. The functional areas breakdown suggests that the criteria used in developing each concept and standard should be separately examined for each functional area and perhaps for combinations of functional areas or sub-areas within them. By any measure, the present blanketing of 377 acres in the downtown area with a single C-3 District is unsatisfactory.

3. There is a definite relationship between downtown amenities and economics; these considerations are compatible and should be carefully balanced. San Francisco enjoys a combination of attractive features in its views, its hills, the Bay, its climate, and its man-made street patterns and buildings, to a degree not found in other cities. It is natural and proper that zoning should reflect and protect these amenities.

These features of San Francisco are directly related to the economics of the downtown area and the rest of the city. The city's image enables San Francisco, though itself stable in population, to gain economic growth through attracting business investment, particularly by large national firms, workers for its talented labor pool, and a needed balance of higher income residents. No less significant is the attraction of visitors for retail shopping, conventions, tourism and entertainment. A dilution of San Francisco's image, and therefore its attraction, would be harmful to economic growth.

Beyond this, certain amenities are a matter of common sense in any city. An owner should not be permitted to over-develop his property at his neighbor's expense, by seriously inhibiting light, air and traffic circulation. Predictability of other owners' future actions is a hallmark of zoning, and an aid to one's own investment decisions. On a broad scale, zoning can prevent the establishment of sudden and unbalanced monopolies on space by the construction of a few oversized buildings, to the detriment of values and development potentials in the remainder of the downtown area.

All this is not to say that zoning ought to impose unnecessary restrictions on design. As far as possible flexibility is to be favored, in the sizes and shapes of buildings, in the placing of combinations of uses in single structures, and in the provision of space for occupants having differing characteristics.

New structures of some type are to be encouraged in all downtown locations, as well as the remodeling of existing structures whose useful life may thereby be extended. An inventory of tall buildings (ten stories or more) in the Downtown Zoning Study Area shows that of 20.6 million gross square feet of office space in these buildings, 12 million is now more than 30 years old and 6.3 million is more than 45 years old, with 5 million square feet dating from immediately after the Fire, which has its 60th anniversary this year. These figures point toward an increasingly competitive situation in the coming years, particularly in office space, and the need to provide for a variety of investment opportunities.

4. Mere height of buildings is not objectionable; other factors must be present to justify a limitation. The height of buildings, far from being a matter of concern in all cases, may in fact be an advantage, if it makes possible the provision of greater open space at ground level, and if it provides greater amenity for the occupants of the building.

The height of a building and the amount of floor space it contains will become critical if the integrity of the functional areas is thereby disturbed, if access and circulation are made a problem, or if certain design considerations are violated.

The first of these design considerations is the provision of adequate light and air to adjacent buildings. Dark canyons at street level and at the lower floors of buildings should be avoided.

A second consideration is the protection of public squares and other open spaces. Properties fronting on such open spaces should be developed so as to derive maximum advantage from the special location which they enjoy, by preserving the integrity of the open space that gives this advantage. Downtown San Francisco has a shortage of public open spaces, a fact which is only partially made up for by the moderate climate of this city, and those open spaces which do exist or may be created in the future should be preserved for the enjoyment of downtown workers, residents and visitors.

A third design consideration affecting height is the protection of views, the most outstanding of which in the downtown area are those from Nob Hill, particularly to the east. Not all views can be preserved, but a clear opportunity for view protection exists in the case of Nob Hill.

A fourth consideration is the maintenance of an existing scale of buildings where such scale is highly significant. This consideration applies at Union Square, and in Chinatown, Jackson Square and the Civic Center. In the case of the latter two areas height limits are already in effect for this purpose; in the case of Union Square and Chinatown, height limits have been proposed to the Board of Supervisors, which has asked that these questions be further studied in the context of this Downtown Zoning Study.

5. The topography of San Francisco is different from that in other cities, and should be recognized in the drafting of zoning standards. The significance of views has already been mentioned. In addition, the roughness of San Francisco's topography and its orientation to the Bay lead to other considerations.

First, there is an overall form to the downtown area, in which the hills and certain of the functional areas have been accentuated over time by clusterings of large buildings. The main clusterings are at the top of Nob Hill, at certain points along Market Street and in the heart of the Financial-Administrative District. Such clusterings, separated from one another by lower buildings, are significant to the image of the downtown area.

Second, topography helps to determine accessibility. Steep hills quite noticeably inhibit the flow of vehicles and pedestrians, and so the slopes of Nob Hill have always set limits to the advance of commercial development to the north and west. In turn, the relatively level top of Nob Hill is like an island in the downtown circulation pattern, readily reached by public transportation but necessarily self-sufficient in automobile parking and pedestrian circulation.

6. Ease of accessibility is not uniform throughout the downtown area, a fact which is highly significant for zoning. Movement of persons and goods into and within the downtown area occurs through a number of means, each having certain advantages and limitations based upon the specific destination. For automobiles, the effect of topography in creating different degrees of accessibility has just been noted. Also significant is the variation in capacity of streets serving the downtown area and the unevenness of street patterns, particularly on either side of Market Street where the cutting through of Fifth and Seventh Streets will provide only a partial amelioration. The freeway system, still in an unsettled stage, provides excellent access to some areas and less to others. Parking facilities, too, are more easily provided and more advantageous in some locations than in others. All this is apart from the factor of existing intensity of buildings, which contributes significantly to congestion on some streets but not on others. In combination, all these factors produce more of a variation in automobile accessibility in downtown San Francisco than in many other large cities.

Other patterns, with some of the same types of variations, exist for trucks and for public transit vehicles which operate along fixed routes. Regional rapid transit will give excellent service, but its access points will be limited.

Still another pattern applies to pedestrian movement, when people leave their automobiles and public transit or travel by foot from one destination in the downtown area to another. Ease of pedestrian accessibility again varies according to many of the same factors, with an emphasis upon topography, sidewalk widths, the presence of pedestrian passageways through the interiors of blocks, and the degree of building development in the area.

It can be seen that the patterns of difficult or easy automobile, transit and pedestrian accessibility will not always coincide with one another, but these patterns must be treated in conjunction with one another for zoning purposes. Zoning should be arranged to permit the greatest intensity of development at locations where the best accessibility is available, provided such locations are consistent with other considerations affecting the bulk of buildings. But this principle does not require easy accessibility to such locations by all methods of travel, so long as pedestrian movement to the location can be easily achieved from points which are in turn easily reached by automobile or transit. The inherent conflict between the movements of vehicles and pedestrians in congested areas must be recognized, and it will not always be desirable to encourage access to all locations by vehicles if easy pedestrian movement is to be assured.

7. Regional rapid transit on Market Street will produce a dramatic change in patterns of accessibility, and this change should be taken into account. Recent construction trends, which have often included movements away from Market Street, will be altered by the new subway system, and Market Street itself will be affected. There are a number of zoning implications in these facts:

First, the South of Market area near Market Street, already readily accessible by automobile, will be subject to new and high intensity development in areas lying adjacent to high intensity development north of Market Street.

Second, there will be a stimulus to new development on Market Street itself, particularly adjacent to the stations. High bulk will be feasible at these locations, especially where direct access to buildings is provided from the station mezzanines.

Third, there will be potential conflicts in circulation on and near Market Street, particularly at intersections. Pedestrian volumes on Market Street, already the highest in the city, will increase.

Fourth, the appearance of Market Street, long a matter of great concern, will have a chance for improvement, but will remain critical to the whole downtown framework no matter what the character of new development.

Fifth, mezzanines and plazas will be created as a new network of pedestrian movement and open spaces which must be integrated with the buildings and streets.

8. Traffic and parking facilities in the downtown area must be treated as limited resources keyed to produce a maximum benefit. Results of the recent Downtown Parking and Traffic Survey show a continuing increase in the burden placed upon streets and parking facilities in the downtown area. There are necessarily some planning limitations upon this type of growth, some of which are pertinent to zoning.

The 1965 cordon count figures showed 338,000 automobiles entering the downtown area (using a boundary quite comparable to that of the Downtown Zoning Study Area) during the 12-hour period of 7:00 a.m. to 7:00 p.m., an increase of 23 per cent over the last such count in 1959. These automobiles in 1965 carried an average of 1.4 persons, a lower ratio of persons per vehicle than in 1959. At the same time, other studies show that some streets in the central Core have already reached capacity in the numbers of vehicles carried in peak hours. The implication is that even if the capacities of freeways leading into the downtown area are substantially increased, downtown streets that are already congested will be unable to accept more vehicles.

At the same time, the number of off-street parking spaces provided in the downtown area has been increasing. In addition to 11,849 on-street spaces existing in the Downtown Parking and Traffic Survey Area, a supply which remains almost constant, there are now a total of approximately 48,500 off-street spaces provided for employees or customers or on a commercial basis. This contrasts with 22,245 off-street spaces in 1948.

It is evident that parking is a major user of downtown land. This is not a serious matter where parking occupies residual open land not needed for other purposes, or where parking is in a building and subordinate to other uses. It is a problem if parking occupies large quantities of land needed for other purposes, particularly in the central Core. This fact and the present strain on streets in the Core support the concept stressed in the 1963 Downtown General Plan of parking belts just outside the Core which will be accessible to vehicles but will intercept them, enabling their riders to proceed to their destinations through uncongested streets on foot or by public transit. Based upon new information thus far available on trends in traffic and parking, the parking belt concept can be further endorsed in this Downtown Zoning Study and considered in the drafting of zoning standards. A corollary for further consideration is the possibility of a policy

of deliberate discouragement of extensive off-street parking facilities in select portions of the Core itself.

In considering such a possible policy, it should be recognized that there are varying degrees of encouragement and discouragement for parking through zoning, aside from the outright requirement or prohibition of parking. Presently, for example, floor area used for accessory parking is not counted under the terms of the City Planning Code in determining the floor area ratio of a building anywhere in the C-3 District. Such an exclusion could be eliminated in some or all areas under revised standards, or it could be applied to some but not to all of the parking provided in a given building. In addition, parking garages which stand by themselves and are not accessory to some other use such as an office building might receive still another type of treatment. Enclosed garages are now permitted unconditionally anywhere in the C-3 District, although all of their floor area is counted in determining the floor area ratio.

For residential uses, still other parking considerations apply. Under present standards, an unfortunate situation exists in which residential buildings constructed even on the edges of the C-3 District have no off-street parking requirement at all, while buildings on nearby R-5 lots must have one parking space for each dwelling unit. It is likely that in both cases some off-street parking should be provided, but with less than one space for each unit, based upon a sliding scale of requirements taking into account the nature of the residents, the size of apartments, the availability of public transit, and other factors affecting the incidence of car ownership.

9. Buildings of architectural and historical significance exist in the downtown area, and to some extent zoning can help to influence their preservation. Surveys have been conducted by agencies other than the Department of City Planning of buildings of historical and architectural significance, including one such study now under way. Studies by the Department concur in many of the evaluations.

In general, the buildings so designated in the downtown area are at scattered locations, and they are of differing characteristics and degrees of merit. It has been concluded that zoning is not a proper tool for attempts at preservation of these scattered buildings, although there may exist other tools to accomplish this purpose.

There are, however, specific areas in which the character of a large number of buildings is of significance, and here the part played by zoning should be further investigated. These areas are the Civic Center, Jackson Square and Chinatown. In each of these, for somewhat different reasons and by differing techniques, zoning can help to preserve the distinctive character of the area as a whole.

B. CONSIDERATIONS AFFECTING SPECIFIC FUNCTIONAL AREAS

The following portions of the Summary and Conclusions apply to individual downtown functional areas. The areas referred to are generally as shown on the map of Statistical Areas in the Appendix, although the boundaries on that map have been simplified for statistical purposes.

Financial-Administrative District

1. This is the area of greatest existing intensity of development, and it has by far the greatest growth potential in the downtown. For the statistical area, bounded by Kearny and Washington Streets, The Embarcadero, Mission and Third Streets, and including also the block occupied by the Appraisers and U. S. Customs buildings, there are 18 million gross square feet of office floor space. When additional properties at the edges of the statistical area are included the total rises to 22.1 million square feet of offices; this compares with 9.6 million square feet of offices in the remainder of the Downtown Zoning Study Area.

A large proportion of the 734,000 persons entering the downtown area daily have destinations in the Financial-Administrative District, and densities of employment are as high as 7,000 persons in a block. The floor area ratio of buildings in the statistical area averages only 5.1:1, although in the primary core of the area along Montgomery and Sansome Streets some blocks approach or exceed 10:1.

About three-quarters of the office space in the Financial-Administrative District, as well as in the Downtown Zoning Study Area as a whole, is more than 30 years old, with the proportion of newer space somewhat higher within the category of major office buildings.

2. An important starting point for zoning in the Financial-Administrative District is found in a demand and supply comparison which relates growth projections for offices to the actual space capacity of this district. An examination of all available projections by a number of methods showed a need for new office space in the whole downtown area for the next ten to 15 years ranging generally from a low of 400,000 gross square feet per year, based upon past growth and conservative estimates of the market, to a high of 800,000 square feet per year, based upon accelerated growth factors and optimism as to the market.

On the space capacity or supply side, a detailed survey was conducted, as more fully described in the text of the Working Paper, of each property in the Financial-Administrative District and its periphery to determine the relative susceptibility of all properties to new development. Among the factors considered were the size and age of present structures on these parcels, recent major alterations, and value and condition. The properties considered susceptible by deliberately conservative criteria were then measured at various levels of overall development, including 16:1 and lesser ratios to take into account possible averaging of development.

It was found that under any of the ratios used, the Financial-Administrative District could accommodate far more than the maximum growth projected, and in fact could double or triple its present office space through development of susceptible properties. With a maximum of 12 million gross square feet of office space needed over the next 15 years at 800,000 square feet per year, sites definitely available or for which development proposals have been announced or construction recently started can accommodate more than half this amount, or 6.5 million gross square feet of offices; this includes 1.5 million square feet or more on the Bank of America site at California and Montgomery Streets, 3 million square feet at the floor area ratio of 8:1 currently permitted in the Golden Gateway Redevelopment Project, and 2 million square feet on a number of additional sites. In considering other properties susceptible to development, it has been found that the central part of the financial and administrative core could accommodate a net increase at 16:1 of 7.2 million gross square feet of office space, the present core as a whole an increase of 20.1 million square feet, and the core and its periphery a total increase of 37.8 million square feet.

The comparison of space projections and capacities has been made only to 1980. It is expected that by that time, the complexion of the Financial-Administrative District will change appreciably, and that the new period will bring a new set of factors into play which will make additional properties susceptible to new development. For present purposes, the import of the comparison made is that the total capacity of this district at any reasonable intensity of development need not be a matter of concern, so that attention can be focused upon other considerations such as the proper boundaries of high-intensity development, accessibility to properties, and the amenities of light, air and good design.

3. In terms of proper boundaries, the considerations are these:

To the west, the district has reached the slope of Nob Hill, meeting with difficulties of access due to topography and raising the problems of interference with views from Nob Hill, encroachment on a residential and special use area of great significance, and encroachment upon Chinatown. Nearer Market Street, there is greater potential for expansion on both sides of Kearny Street, and a closer tie-in with the Retail District.

To the north, the district has a natural boundary at the Portsmouth Corridor along Clay and Washington Streets, where it meets the Golden Gateway residential area and the low-intensity structures in Jackson Square. A transition of bulk along the Portsmouth Corridor is indicated.

To the east, expansion is limited only by the Bay, although the intensity of development may recede with the increasing distance from Montgomery Street. A major question for the future of this area is posed by the uncertainty of ultimate direct regional rapid transit service to the station at Davis and Drumm Streets.

To the south, current building projects already point the way to development south of Market Street, up to the south side of Mission Street where the Trans-Bay Terminal forms a barrier. Rapid transit on Market Street will contribute to development here and further to the west in the Yerba Buena Center Redevelopment Project.

4. In terms of accessibility, amenities and design, the provision of open spaces on the ground and at upper stories will often be the key in the Core area. Where bonuses are offered through zoning in such situations in other cities, there is a focus upon the pedestrian network and upon buildings as generators of pedestrians. For this reason, bonuses of extra building bulk are offered for plazas, arcades, landscaping, interior passageways through blocks and other pedestrian features. Other aspects for which bonuses are given might include penetration of light and air to streets, easy access to the building by trucks and automobiles, protection of public open spaces, view preservation, or intrinsic distinction of design.

In any case, the main purpose of bonuses should not be to permit more floor space simply because it can be physically accommodated on the site. The existing 25 per cent bonus for corner lots in the San Francisco City Planning Code, which applies to all zoning districts having a floor area ratio and not just to C-3, was written primarily for Residential districts where coverage and rear yard requirements are also less restrictive for corner lots than for interior lots, and where the facing of dwelling units on the open spaces provided by streets is a consideration. This corner bonus is less appropriate in a downtown office district, where street and sidewalk circulation is more of a problem and the basic floor area ratio permitted is more imposing.

5. There is an interest in providing office building sites for a variety of occupants. It is not expected that the type of new development will be exactly the same throughout the Financial-Administrative District, or that a situation will ever exist in which all firms will be interested in newer space. The district should accommodate a variety of rent levels and levels of prestige. This is significant to the movement and expansion of firms now located in the downtown area, and it can be even more important for firms which may enter downtown San Francisco from other areas; it is with these latter firms that much of the untested downtown growth potential lies.

Retail District

1. In comparison with other major cities, the downtown retail area in San Francisco is vital and of substantial size. Recent U. S. Census figures show the San Francisco Central Business District fourth ranked nationally in total sales at $489 million annually, with better growth rates than most other major cities. Downtown department stores have experienced some decline, although they remain strong headquarters locations with branches elsewhere in the Bay Area. There is increasing emphasis upon specialty stores, particularly in apparel.

2. The strength of the retail area is reflected in continued high property values and in the rate of substantial interior alterations to buildings. No extensive new construction is known to be contemplated, however, except for the new Roos/Atkins headquarters store at Stockton and Market Streets. It is expected that most further investment will be in remodeling, with the possibility also of new construction of retail space in combination with other uses such as offices and hotels.

3. In these circumstances, the principal interests in the Retail District are in improving access and maintaining the amenities which are important to this district. The present compactness and convenience of the district should be encouraged. If possible, access from the Powell Street transit station by interior pedestrian passageways through blocks should be stimulated. Means of assuring continuity of shopping frontage should be considered.

In addition, better linkages to potential customers in the Hotel-Entertainment District to the west and the Financial-Administrative District to the east should be encouraged. This is particularly so with regard to the growing office worker market, which offers one of the best potentials for retail shopping; a mixture of new retail and office uses in the under-used Kearny Street area would improve this relationship. At the same time, the important entry from the north and west provided by Union Square, and the amenities to shoppers offered by the Square, must be preserved.

Hotel-Entertainment District

1. There is a potential for one or more large new hotels to supplement the approximately 12,000 rooms now existing in major hotels. The potential will be even greater if the older of the large hotels, now past middle age, are inactivated due to high operating costs and lack of modern facilities.

2. The potential for space in large hotels derives from conventions, which are the real growth factor in this industry. In 1964, visitors to conventions are estimated to have spent $76 million in San Francisco, compared with $73 million for all other visitors. In the convention trade, hotels are linked to many other downtown facilities, including meeting and exhibit halls, retail stores, restaurants and entertainment facilities, and to each other. For this reason, it is advantageous for hotels to be located in one area and close to as many of these other facilities as possible. Development of meeting and exhibit facilities in Yerba Buena Center should exert a pull of the hotel area southward toward Market Street.

3. The configuration of the hotel area may be further influenced by continuing conversion of older, smaller hotels to occupancy by permanent residents. This type of conversion presents zoning problems where different standards for density and open space apply to commercial hotels and residences in the same area.

4. There is also a difference in parking needs for hotels and residences in the same area, based upon the type of occupancy. Parking needs differ among commercial hotels oriented toward conventions, apartment hotels with small units and single-person occupancy, commercial hotels not oriented toward conventions, and apartment buildings with units of various sizes. It is likely that these differential needs should be taken into account in zoning, as well as a differential in policies as to which of these needs are to be accommodated in public and private commercial garages and which on the site of the building itself.

5. With a shift of entertainment facilities to Broadway and other areas, this function has declined in the Hotel-Entertainment District. However, the possibilities for further expansion in the Broadway area are limited, particularly for large facilities. It is possible that with the development of regional rapid transit on Market Street and the building of Yerba Buena Center this older entertainment area can be revived, making use of currently underdeveloped sites.

Chinatown Commercial District

1. It is anticipated that there will not be great growth in this area, but rather than most existing functions will be intensified and improved.

2. This involves an increase in the tourist, retail and entertainment functions on and near Grant Avenue. This corridor has grown in significance in recent years as a link to the entertainment facilities in the Broadway-Kearny Entertainment District.

3. There is stability in the Chinese community retail and office functions along Stockton Street.

4. There is little potential for increase in residential use in this commercial portion of Chinatown, and there may be a continued decrease. Any new apartments that are built will be at a higher standard than the older housing in the area, and it is questionable whether a substantial market exists for apartments in the high rent ranges at this location.

5. Stability in the existing Chinatown institutions and family association headquarters is expected.

6. Present congestion on Chinatown streets will inhibit the greater intensification of uses in this area, presently occupying buildings of moderate size.

7. Therefore, the main concern will be with preservation of the good attributes of Chinatown and with the fitting in of this area with the whole structure of downtown.

8. The development of a Chinese cultural center at the Old Hall of Justice site will provide a new focus for Chinatown and a transition to the Portsmouth Corridor which will add more of an east-west axis to this district.

Jackson Square

1. The century-old buildings in this area are an important and unified historical asset for the city, and their preservation should be encouraged through zoning. The height limit now in effect in this area has assisted such preservation.

2. Current trends indicate a possible danger to the principle of preservation, through displacement of existing uses by retail uses to serve the growing Golden Gateway residential community, and entertainment uses from the adjacent Broadway area.

3. Additional problems are caused by the off-street parking requirements of the 1960 City Planning Code for conversions of warehouse and industrial buildings to office and showroom use in those portions of this district which are not zoned C-3. However, although the access to the area is good, the lack of parking facilities is acute. This situation will be improved with the completion of the large garage under the Alcoa Building.

4. Several blocks of industrial zoning, reflecting the scattered industrial uses which still exist, are an anomaly in this area; the zoning should be more uniform and reflect prospective rather than past uses.

Broadway-Kearny Entertainment District

1. This district is among the most constricted in the downtown area, being surrounded almost completely by the Financial-Administrative, Jackson Square and Chinatown Districts and two residential areas. The main possibility for growth may be through greater intensification of the present uses along Broadway and portions of Columbus Avenue and Kearny Street. Development thus far has been through remodeling, but some new construction may be expected. Extensive encroachments upon the surrounding areas would be undesirable.

2. Parking is an acute problem. Existing facilities are overtaxed, and Broadway and the nearby residential streets overcongested. Parking on individual sites is impractical, and garages along Broadway itself would reduce space available for entertainment functions and add to street and sidewalk congestion. Garages at the freeway ramps in the vicinity of Broadway and Sansome Street and at the west end of the district north of Broadway appear to be the most practical solutions.

Nob Hill Special Use District

1. This is a world-famous area with a unique combination of uses, a special identity, and a sense of history and prestige. The present combination of uses, as recognized by the current residential zoning, should be preserved, and encroachment by incompatible uses such as retail and offices should be avoided.

2. The existing residential zoning is too crude an instrument, however, to recognize and maintain the character of this area, and the possibility of a special zoning district for Nob Hill should be investigated.

3. Protection of the open space in Huntington Square and around the Pacific Union Club can be a function of zoning, as well as the protection of nearby residential buildings.

4. The hill presents problems of view preservation, placement of buildings, and access. Because of the difficulty of access by foot, it is probable that all future uses should be required to have off-street parking.

Civic Center

1. An important need for this area is recognition of the Civic Center Development Plan, characterized by critical relationships among building masses, in the development of non-public buildings in the surrounding area. This has been partially achieved through height limit districts and a special sign district.

2. The Civic Center is generating and will continue to generate related uses in adjacent blocks, including offices, retail and service establishments, and apartments. Office buildings of high bulk will best be located near subway stations.

3. Present zoning boundaries require clarification in this and adjacent districts.

Outer Market

1. The portion of Market Street designated as Outer Market in this study, from Eighth Street to the Central Freeway crossover, has a new potential for office facilities, produced by the growth of the Civic Center, the pull of existing office facilities in this area, and the coming of rapid transit and improved Municipal Railway service.

2. It is questionable how great this growth will be, and how desirable it might be to have a second office center which might detract from the Financial-Administrative District. This district does, however, have the accessibility required for intensive development.

Polk-Van Ness Corridor

1. Present uncertainties as to the future of this area will be reduced by the carrying out of the Western Addition Area 2 Redevelopment Project and by resolution of freeway routes.

2. It is likely that the orientation of Van Ness Avenue to uses requiring good automobile access will continue, although automotive sales and repair uses may further decline. Restaurants, motels and professional offices at moderate intensity are strong possibilities for future development, with perhaps a greater opportunity in the future for a boulevard appearance on this street.

3. Polk Street, with a decline in automotive repair, may increase its emphasis upon neighborhood shopping and specialty stores. The present mixture of C-M, C-3 and C-2 zoning on this street does not properly reflect its functions.

Downtown Residential Areas

1. These areas, which include the Golden Gateway, most of Nob Hill, and the Midtown Residential Area west of the Hotel-Entertainment District, are capable of providing a variety of downtown living accommodations.

These locations are convenient to work and other downtown facilities, and their further residential development would contribute to the stability of a number of the downtown districts, especially the Retail District.

2. The potential is greatest for small dwelling units for single working persons, for further luxury construction once the luxury space recently built has been absorbed, and for accommodations for moderate and lower income persons, particularly the elderly, who already live in these areas or who may be displaced from the South of Market area. The Community Renewal Program reports have projected a considerable need over the next 12 years for small living units of the type that could be located downtown.

3. Present standards for construction and conversion of residential buildings in the downtown area require examination, with regard to the density of units permitted, the maximum bulk of structures, and the open spaces required. Also, there may be some need for better definitions of lodging houses and hotels so that there will be no ambiguity as to which standards should apply to any given building.

4. Some off-street parking is needed for all dwellings, no matter where located, and the possible application of a sliding scale of parking requirements was suggested earlier.

5. Substantial portions of the Midtown Residential Area, the south slope of Nob Hill and the northeastern section of Nob Hill contain mixtures of uses in which dwellings predominate but ground floor retail uses serving the neighborhood occur with frequency. Many of these areas presently have commercial zoning to recognize the ground floor retail uses. It would be feasible to draft a form of mixed-use zoning which would recognize the predominantly residential nature of these areas while at the same time classifying the stores as conforming uses.

The South of Market Area

1. Expansion into the South of Market area of many functions now located north of Market Street can be anticipated with the coming of rapid transit, but that expansion will occur in a measured fashion and will depend upon a number of factors. One of these factors is the success of the Yerba Buena Center Redevelopment Project. At present the C-3 District includes only the south frontage of Market Street in most instances, and some readjustment is desirable. At present, however, movement of this line should be limited, and in any event no need for high-intensity zoning south of Howard Street is anticipated, even for the southward movement of the Financial-Administrative District.

2. The Yerba Buena Center Project area is at a pivot between the Financial-Administrative, Retail, Hotel-Entertainment, business service and light industrial sections of downtown, and in this location it will exert important influences upon these other districts.

3. There is a considerable potential for further development to the west of Yerba Buena Center, but such development will be inhibited by the large block size, the alleys and the smallness of the lots.

4. Though generally underdeveloped, the South of Market area has important supporting functions for the downtown area which should not be overlooked: these include services such as printing, building maintenance, contracting, automotive repair, trucking and parking. Clearance of a substantial part of the South of Market for additional special uses, such as a new campus for the University of California, would call for major restructuring of these uses for service to the downtown area.

5. New residential uses in the South of Market area should not be considered likely or desirable. Gradual removal of existing residential uses will occur, and in the case of dwelling units in the M-1 District at and below Folsom Street a mandatory removal date of 1980 now exists in the City Planning Code.

* * *

With the above framework of general considerations and considerations affecting specific functional areas, the Downtown Zoning Study now will proceed in the final six months of the study period with the formulation of detailed zoning evaluations and recommendations.

I. CHARACTERISTICS AND REQUIREMENTS OF SPACE USE AND ACTIVITY

An exhaustive inventory of present characteristics, past performance and emerging trends was undertaken as part of the Downtown Zoning Study. These studies were primarily oriented toward a description of the characteristics of non-residential building space and activity within downtown, with some attendant study of residential uses. The purpose of these studies was to understand these present systems of activity and space and how they would be affected by zoning standards.

The future requirements for downtown and its many parts were then studied to anticipate future downtown development. Added to the studies of present characteristics and trends, these projections of future requirements round out a general technical framework in which revisions to zoning standards will be considered.

A. BASE MAPS AND DATA BANK

The Department of City Planning, assisted by the consultants, prepared a special base map for the Downtown Zoning Study. This map includes the total Study Area on a scale of 1"=200' and is up to date for City Assessor blocks and parcels. The map is also reproduced at a scale of 1"=400'. In addition, a special work map was prepared indicating in the most intensively developed areas parcel numbers coordinated with the information in the data bank.

The data bank for study of space use and activity was based upon a file prepared for the Commercial and Industrial Survey done by Arthur D. Little, Incorporated for the San Francisco Community Renewal Program. The original file materials were collected as a condition survey and the use of these materials for the purposes of the Downtown Zoning Study required some refinement and also the addition of certain related data. Considerable effort in the first months of the program was put into refining and restructuring some of the data in this initial file. Refinement of the following data was performed:

1. Employment
2. Number of floors
3. Assessed values
4. Building floor area
5. Age of building
6. Major alterations (new data)

A data consultant who participated in the original Commercial and Industrial Survey was retained to modify the data bank and to produce data output for direct use in the Downtown Zoning Study.

A series of data printouts was then requested from the new data bank, thus modified. A number of tables were developed for this report and are included in the Appendix, and a complete list of materials available follows:

1. Assessed value of land, $/sq. ft.;
2. Assessed value of building, $/sq. ft.;
3. Ratio of assessed value of building to land expressed in total valuation and in per square foot valuation;

4. Alterations permit values for 1945-55, 1955-65 in $/sq. ft. of building;
5. Frequency distributions of (3) and (4) above for entire study area and by predominant space use category;
6. Employment by Standard Industrial Classification grouping;
7. Space use of buildings by predominant use;
8. Total employment per block;
9. Total building floor area per block;
10. Employee density per block;
11. Floor area ratio per block;
12. Condition of buildings (rated by CRP);
13. Summary by Functional Areas (generalized to groupings of blocks indicated on the map "Statistical Areas" shown in Appendix);
    a. Employment by Standard Industrial Classification,
    b. Alterations by space use category,
    c. Land area by space use category,
    d. Building floor area by condition and age,
    e. Building floor area by space use category,
    f. Building floor area by space use category by
        Age
        Condition
    g. Employees by square feet of building floor area.

Information in the data bank was supplemented by collection of data on population, housing, office space trends, sales and traffic, also represented by tables in the Appendix. In addition to this extensive updating and data collection, a series of over 20 interviews with industry representatives and downtown interests was made by teams of staff and consultants. An exhaustive review of published materials on downtown was compiled on more than 40 abstract forms.* Finally, review of and coordination with ongoing studies and agencies was maintained throughout the study period. All of these sources were used to provide information and informed insight into the issues of downtown development and implications for zoning.

B. BUILDING FLOOR AREA, USE AND EMPLOYMENT

Table 1 in the Appendix is a summary of building floor area by dominant space use category in each of the functional areas of downtown San Francisco. Each building was classified by a major or dominant use category. In cases where the building was divided so that there were several uses each occupying 1/3 or more of the building, a mixed use category was used. A table of percent distributions of building space by these categories for the functional areas is also included as Table 2.

Table 3 in the Appendix shows employment totals and employment composition of the various functional areas. The table lists estimates of employment in each functional area by type of building. Each building was classified by its major or dominant use as indicated previously.

Employment totals in the Study Area were also tabulated by major Standard Industrial Classification indicating the types of employers in the downtown area. (Table 4) By studying the tables of building types, space use, and types of employers included in the Appendix a

*Of particular importance was the series of background studies included in "Studies in the Economy of Downtown San Francisco," San Francisco Department of City Planning, September, 1963.

profile of the use composition emerges for the functional areas in the Downtown Zoning Study. (Refer to "Statistical Areas" map in Appendix)

This study shows that in the Financial-Administrative District almost 90 percent of the employment and 80 percent of the total space is in offices. Approximately 36 percent of the employment is in finance, insurance and real estate, and other major employers are communications, utilities, transportation, manufacturing, Wholesaling and miscellaneous business services.

In the Retail District also, a large number of employees work in office or mixed office-retail buildings. Characterization of this area as retail is indicated by the dominance of retail ground floor uses and by the largest employer - shopping goods retail (General Merchandise). The office uses range from miscellaneous business services to transportation, professional and medical offices, specialized wholesalers and finance, insurance and real estate. Parking and hotels are also important uses in the Retail District.

In the Hotel-Entertainment District, hotels and offices are the most important building categories with hotels and eating and drinking establishments the most important employers. Office uses are mostly of professional, transportation and communication employment. Another important employer is theater and amusement uses, and other space uses are parking, clubs and institutions.

In the Chinatown Commercial District, offices and residential-commercial buildings hold the most employment with finance, insurance, transportation and communications being the most important sources of office employment. Shopping goods, retail, eating and drinking and garment manufacturing are important employers in the Chinatown area.

Jackson Square office and industrial buildings are the most important in amount of employment; printing and miscellaneous services being the dominant employers. Retailing is an important space use.

In the Broadway-Kearny Entertainment District, restaurants and residential-commercial space categories hold the most employment. Eating and drinking places are the dominant employer and printing, retail and manufacturing are also important.

In the Nob Hill Residential Area the predominant space above the ground floor is residential and the important building categories in terms of employment are residential-commercial mixtures and clubs and institutions.

In the Nob Hill Special Use District, hotels are the dominant non-residential space use category and represent the major employment.

In the Midtown Residential Area, residential uses and hotels are predominant above the ground floor and ground floor uses containing employment are in hotels and residential-commercial buildings. Government, hotel and eating and drinking establishments are the major employment groupings.

In the Civic Center, office and government space categories contain the predominant employment. Government contains over 90 percent of the employment in this area with miscellaneous business services as the remaining significant employer. Parking is an important space use.

Outer Market has retail-office buildings as the most predominant space uses and finance and miscellaneous business service as the dominant employment types.

The Polk-Van Ness Corridor is an office, retail and residential-commercial space use district. General retail, auto repair and professional offices are the predominant employers. Hotels and warehouses are important space uses.

In the South of Market-East Area, warehousing, industry, offices, retail and clubs and institutions all are dominant space use categories. Major employers range from government to a cross section of the industrial SIC groupings, and wholesaling.

In the South of Market-West Area, warehouse, industry, and retail commercial comprise the major space use categories. In this area the general range of industrial SIC groupings are present with important government, miscellaneous business services, printing and retail uses. Hotels and residential are also important space uses.

C. DENSITY AND CONDITION OF BUILDING SPACE

A map has been prepared by the Department of City Planning showing the floor area ratio (F.A.R.) of all commercial and industrial space on a block basis. This map was developed from data printouts approximating total commercial and industrial space per block.

The Department of City Planning has also prepared a map of tall buildings in downtown and an accompanying detailed table. This map and table indicate the buildings or portions of buildings in downtown San Francisco with a height of at least 113 feet or 10 stories. Floor area ratio, height in feet, stories, and year built are recorded for the 185 buildings in this category. Clusters of these structures to the east and south of Nob Hill and at the apex of Nob Hill are indicated on this map.

A series of work maps concerning height, as well as ownership, assessed valuation, etc. were prepared in late 1964 as part of a study by the Department of City Planning of Special Height Limits proposed by the Chinatown Technical Advisory Committee.

The areas of highest non-residential floor area ratio downtown are in the Financial-Administrative District along Montgomery and Sansome Streets. The highest floor area ratio per block is 13.1:1 in the block bounded by Montgomery, Sutter, and Market Streets including the new Wells Fargo Building, presently under construction and excluding the Nevada Bank Building, scheduled for demolition. In the adjacent blocks north and east, the floor area ratio is in a range of 5:1 to 10:1. Floor area ratios in the Retail District generally range from 4:1 to 7:1 with one particularly high block having an F.A.R. of 8.4:1 at Powell, Ellis and Market Streets. In the Hotel-Entertainment District floor area ratios per block around Union Square are in

the range of 4:1 to 8:1. In the remainder of the more concentrated portions of downtown, non-residential floor area ratios per block range generally from less than 1:1 to 2:1 and 3:1 with F.A.R.'s of 4:1 to 7:1 along Market Street.

Employment density in the Downtown Zoning Study Area is highest in the area bounded by Sacramento Street on the north, Battery Street on the east, Market Street on the south and Kearny Street on the west. In this primary financial core area, employment densities are in excess of 1,000 employees per acre ranging upward to over 2,000 in two blocks and 2,800 in the most intensive block. Other areas of high intensity having 500-1,000 employees per acre are in three locations: (1) east of the primary financial core to Drumm and Main Streets, extending south to Mission Street, (2) west of the primary financial core to Grant Avenue from Post on the north and Powell Street on the west to Market Street on the south and (3) in the Civic Center where two blocks exceed 1,000 employees per acre and the new Federal Building accommodates 1,770 employees per acre.

A work map for study purposes has been prepared indicating the condition of commercial and industrial structures in the area covered by the Census Central Business District from condition ratings developed by the Commercial and Industrial Survey of the Community Renewal Program.

In all of the commercial and industrial areas of San Francisco studied by the Community Renewal Program including the whole eastern third of the city, eight percent of non-residential space is in Condition Category 6, a state where buildings and blocks could be roughly approximated as blighted. Of the functional areas, the Broadway-Kearny Entertainment District and South of Market-West areas have the highest percentage of floor space in Condition Category 6 with 15 percent and 24 percent respectively. South of Market-East with nine percent non-residential space in Category 6 also displays a significant percentage of "blighted" floor space.

In the retail space use category, more than 19 percent of the space is in Condition Category 6 in the Hotel-Entertainment, Outer Market and South of Market areas. Functional areas with 9-18 percent retail space in the blighted category are Financial-Administrative, Chinatown Commercial, Broadway-Kearny Entertainment, Nob Hill Residential and Civic Center. This wider distribution of Condition Category 6 retail space is contrasted to the distribution of Condition Category 6 office building space limited in any significant degree to the Outer Market and South of Market-West functional areas. The retail-office combined space uses are 19 percent or more Condition Category 6 in the Hotel-Entertainment, Chinatown Commercial, Jackson Square and South of Market areas.

In the Community Renewal Program the following standards of renewal were recommended for commercial and industrial areas:

a. areas with less than nine percent of non-residential space in Condition Category 6 - "maintenance areas" - code enforcement and conservation measures,

b. areas with 9-18 percent of non-residential space in Condition Category 6 - "improvement areas" - concentrated code enforcement and rehabilitation measures,

c. areas with 19 percent or more of non-residential space in Condition Category 6 - "rebuilding areas" - selective clearance, rehabilitation and reconstruction measures.

Accordingly, South of Market-West was designated a rebuilding area in the Community Renewal Program with emphasis on clearing residential development and replacing with suitable commercial or industrial uses. South of Market-East was classified as an improvement area for code enforcement and rehabilitation, and portions of the Broadway-Kearny Entertainment District were likewise designated.

D. OCCUPANCY AND VACANCY CHARACTERISTICS OF OFFICE SPACE

The San Francisco Building Owners and Managers Association has conducted semi-annual surveys of their membership in the downtown area. The membership includes a large percentage of "office" buildings, large and small, and fewer "loft" or lower grade office buildings.

Between May, 1962 and May, 1965, the two dates of survey shown in Table 5 in the Appendix, the total number of member buildings in the area increased 6.2 percent. The total rentable area in the three-year period increased almost 15 percent, and of this space, 10.5 percent was competitive rentable and 21.6 percent non-competitive rentable (used by owner or on a long term rental). Thus, office space belonging to members for long term lease or owner-occupied increased twice as fast as the space for general occupancy. In the three year period, the number of owner-occupied buildings increased from 20 to 27. There was, in the three years, a decrease in the number of medium financial structures, structures on lower California Street and upper Market Street (around Sixth Street). There was an increase in the number of buildings in the large financial group, buildings of the small financial group, and buildings in the Market, Post and Kearny Streets area, lower Market Street, and in the Retail District.

In the three years between May 1, 1962 and May 1, 1965, 2,197,455 square feet of net rentable office space of members had been added to the market. This represents an annual average increase of over 730,000 square feet in member buildings.

According to studies by the Building Owners and Managers Association up to 75 percent of the recent increases in office space demand have been generated by moves within the downtown area for purposes of expansion or occupancy of more modern space, and by expansion within existing office buildings. New space demands by tenants from other cities or from outlying buildings have been a relatively small factor in the recent past.

The highest percentage of vacancies in competitive rental space occurred in the area around Sixth and Market Streets where almost 30 percent was vacant on May 1, 1965. As of that date, 7.84 percent of the total competitive rental space in office buildings was vacant.

The lowest percentage of vacancy occurred in the company-owned and occupied structures. Among the other buildings, medium financial structures enjoyed the highest occupancy of 96.8 percent followed by buildings in the lower Market Street area of 96.03 percent.

In July, 1964, Real Estate Research Corporation conducted a survey of office space in the financial and administrative area and rated the quality of construction of buildings (See Table 6 in Appendix). The buildings were divided into three categories: those constructed prior to 1918, those from 1920 to 1941, and those from 1946 through 1963. The buildings were rated as being in excellent, good, fair or poor condition. It was found that in all instances, the highest vacancy rate occured in the oldest and poorest quality buildings. The highest percentage of vacancies occurred in the buildings constructed prior to 1918, and over 20 percent of the vacant space in this age group was in poor condition, four percent in fair condition and three percent in good condition. Of the space constructed between 1920 and 1941, almost 30 percent of that vacant was found to be in poor condition and one percent in buildings of fair condition.

The survey showed in the financial and administrative area, only three percent of all the total rentable floor space and 4.4 percent of all competitive rentable floor space was vacant. The 1964 survey showed low vacancy levels in competitive office space in the financial and administrative area, slightly higher (9.5 percent) in the competitive space in the retail area and low levels in competitive space in other areas of downtown (4.4 percent).

The long range trends in occupancy characteristics for office space in downtown San Francisco have assumed a cyclical pattern. Each cycle is composed of phases of extremely high occupancy followed by major construction of new space, moves and expansions and relatively lower occupancy. The major construction phases are followed by the increased remodeling of older space to remain competitive until the total inventory adjusts to the character of the space demands. New construction declines and the competitive space then experiences a resultant high occupancy phase once again.

The high occupancy periods have been in the 1920's and post-World War II periods with the lower occupancy periods around the 1910's and pre-World War II. Recent high occupancy figures and the large amount of new floor space being constructed or in the planning stages would indicate a present transition between phases

E. NEW CONSTRUCTION, AGE AND MAJOR REMODELING OF BUILDING SPACE; CHARACTERISTICS OF OFFICE SPACE

A work map has been prepared by the Department of City Planning showing all buildings constructed in the past 30 years and all major remodeling. The data bank also is keyed to age of buildings in terms of up to 30 years versus over 30 years, as indicated in Table 7 in the Appendix.

Remodeling was estimated using accumulated building permit applications for two time periods, 1945-55 and 1955-65. All permits of a value of $5,000 or more were accumulated for buildings in the

Downtown Study Area and a cut-off per building of $100,000 for the earlier time period and $30,000 for the later period was used for input to the data bank. A computer program calculated all recorded remodeling permit value per square foot of building space and all values in excess of $10 per square foot in the period 1945-55 or $5 per square foot in 1955-65 were plotted on a work map.

Approximately 73 percent of the office space in the Financial-Administrative District was built prior to 1935. In the Retail District approximately 99 percent of all office space was built before 1935. In contrast only 29 percent and 49 percent respectively of the office space in the Civic Center and Outer Market Street functional areas was constructed before 1935.

The highest number of remodeling efforts in the past twenty years have been in office buildings. Favorable climatic conditions lessen the significance of lack of air conditioning in older buildings. However, the large stock of older space, especially in the Retail District, indicates a mounting obsolescence in relation to the growing inventory of "modern" office space.

Eighty-eight percent of retail space in the Retail District was built prior to 1935. There have been numerous cases here of alterations in the past 20 years. In the Hotel-Entertainment District 88 percent of the hotel space and 98 percent of the restaurant space was built before 1935. In the Chinatown Commercial District including fringes of the Financial-Administrative District over half of the office space was constructed after 1935.

South of Market Street, 29 percent of industrial space in the South of Market-East Area was built after 1935 and 11 percent of the industrial space in the South of Market-West Area was built since 1935. Warehouse buildings constructed since 1935 are 18 percent of the total warehouse space in the South of Market-East Area and 11 percent in the South of Market-West Area. Warehouse and office buildings built since 1935 comprise 38 percent of that kind of space in the South of Market-East Area and 22 percent in the South of Market-West Area.

Significant alteration activity was observed in a number of functional areas in different space use categories. Alterations have occurred in restaurant space in the Broadway-Kearny Entertainment District, residential-commercial mixed buildings and special industrial buildings in the Chinatown Commercial District, office, warehouse-office, retail-office and restaurant space in the Financial-Administrative District, hotel space in the Hotel-Entertainment District, bank space at Outer Market, and office and retail space in the Retail District.

New construction activity is highlighted by the large number of office buildings constructed in the Financial-Administrative District and by other office buildings scattered throughout the remainder of the downtown area. In the Retail District, with very few exceptions, there has been no new construction since 1935. Hotel construction has been scattered to the outlying areas including motor hotel and motel construction with one major hotel and a motor hotel constructed in the Hotel-Entertainment District and a major addition on Nob Hill. The Nob Hill Residential Area shows the major amount of recent residential construction

and aside from Nob Hill and the Golden Gateway there have been few major residential structures built since 1935 in the Study Area. New industrial construction has been distributed throughout the M-1 Zoning District in the South of Market Area near the freeway.

Office space has always been the largest category of space use in downtown San Francisco, and now represents 31,670,650 square feet of the 90,923,500 gross square feet of floor space in the Downtown Zoning Study Area or approximately one-third. About three-fourths of this office space was built before 1935 and one-fourth or approximately 8 million square feet was built within the past 30 years, the major portion of this within the past decade. The greatest amount of the total office space (approximately two-thirds) is in tall buildings of 10 stories or more, and 60 percent of this space was constructed before 1935. Relative to other commercial and industrial space, office space in the downtown is of suitable construction and in good condition. Roughly 70 percent of office space is Type 1 or fireproof construction and only 2.1 percent is in a blighted condition according to the Commercial and Industrial Survey of the Community Renewal Program. Approximately 60 percent of the total downtown San Francisco employment or 133,000 persons is employed in office buildings. The intensity of space use or ratios of gross square feet of floor space per employee is relatively low in San Francisco. These ratios are discussed later in this Working Paper.

Office space in the downtown can be characterized as having a major component of older space and a minor component of newer space with a gulf of twenty to thirty years between most of the space in these two components, and a significant new inventory of space under construction or in planning stages. The space for the most part is older, in fair to excellent condition and of suitable construction with lower ratios of gross floor space to employee by national large city standards.

The quality of space varies considerably from functional area to functional area as previously discussed. Along Market Street, South of Market and in older, smaller buildings the space is poorer and less desirable. In the larger, older buildings especially in the Financial-Administrative District, functional obsolescence has not progressed at a rate experienced in other cities due to climatic conditions tempering the demand for air conditioned space and the recent occurrence of a significant inventory of "modern" space. If tastes as to the character of space change strongly toward more modern space, the functional obsolescence of the older inventory could be more rapid.

F. VALUATION AND RENT

1. Valuation

A work map has been prepared indicating the ratios of assessed values of buildings to land in the central part of the Study Area. These ratios were used as one factor in evaluating the relative degree of "underdevelopment" of sites to ascertain areas where new construction may occur.

The assessed value ratios indicated that 56 percent of the parcels studied had a ratio of less than 1 (the assessment of improvements was less than the land assessment for the parcel). Recognizing all of the

uncertainties in assuming comparable ratios of assessed valuations to market values, an assessed value ratio of less than 1 can indicate possible susceptibility for re-use. Further discussion of this point is to be found in later sections on the Space Capacity Study.

Also on a work map are assessed land values per square foot throughout the same area expressed in approximate ranges. The assessed land value per square foot data indicates that the highest land assessments are between Sansome and Powell Streets, for a distance of three to four blocks north of Market. This highly assessed core of the Financial-Administrative and Retail Districts includes Market Street from Second to Seventh Streets. In the concentrated area mentioned above, land assessments are in a range of $10 or more per square foot ranging upward to assessments of $50-$90 in the Kearny Street to Powell Street area in the blocks along the north side of Market. Areas of $6-$10 per square foot land assessment are at the Civic Center along New Montgomery, in extensions of the Financial-Administrative District to the east and west and in the extension of the Retail District west into the Hotel-Entertainment District to Taylor Street.

2. Office Building Rentals

In 1962 the Department of City Planning found that monthly rentals in a sample of buildings in excess of 100,000 square feet of floor area ranged from 35¢ per square foot through 75¢ per square foot, the higher rentals to be found in the newer buildings, or those that were under construction.

The same ranges applied on November 25, 1964 in an analysis of office space in the Financial-Administrative District of San Francisco by the firm of Julien J. Studley, Incorporated of New York. New buildings, either just opened for occupancy or to be opened for occupancy during 1965 and 1966 were to rent between 53¢ and 70¢ per square foot. The Hartford Buildling rent was to be between 54¢ and 70¢ per square foot, the Alcoa Building 55¢ to 75¢ per square foot, the Wells Fargo Building 58¢ to 75¢ per square foot, the Bank of California 55¢ to 70¢ per square foot, and the Hong Kong Bank Building 55¢ to 65¢ per square foot. Recent project planning is based upon assumed competitive rentals of up to 85¢ per square foot of rentable space.

In 1962, the Department of City Planning found that ground floor rentals in a sample survey taken in the Financial-Administrative District ranged between 39¢ per square foot and $2.00 per square foot. The highest ground floor rentals were paid by specialty shops and restaurants; the lowest ground floor rentals of 39¢, 40¢ and 57¢ per square foot were paid by banks and some stock brokers. Ground floor tenants in the Financial-Administrative District do not ordinarily have percentage leases; however, even in the list of tenants surveyed, there were a few exceptions. Whereas office tenants are usually provided with janitorial service, retail tenants do not ordinarily have this service provided for them. The financial institutions that were enjoying a lower ground floor rental had no services provided for them by the building owners.

Further study of rental ranges and building operation practices will be part of a subsequent Working Paper.

G. OWNERSHIP PATTERNS

An up-to-date parcel map was drawn especially for the Downtown Zoning Study. A map of ownership by type of owner as indicated on official city records was also compiled for the central parts of this area. This map indicates ownership by financial institutions, firms set up to own a building, private individuals and real estate or investment companies. Where data were available, common ownership was indicated and recorded on the map. Analysis was also made of changes in lot lines since 1960 and properties assembled for new construction since 1935.

H. HISTORICALLY OR ARCHITECTURALLY SIGNIFICANT BUILDINGS

A work map was assembled by the Department of City Planning indicating historically and architecturally significant buildings. The map indicates these structures are scattered throughout downtown with significant areas of concentration limited to Jackson Square, Chinatown and the Civic Center. This map will be used at a later date to ascertain the probable effect of proposed controls upon the long run retention of these buildings. It has been concluded that zoning is not a proper tool for preservation of the scattered buildings but in specific areas where the character of a large number of buildings is of significance, differing zoning techniques can be employed to help preserve this character.

I. LAND USE

A finished map, in color, was prepared showing detailed ground floor land uses in the central portions of the Study Area. This map is the result of a survey of Polk's directories undertaken by the Resident Consultants, recording establishment use on the ground floor by Standard Industrial Classification Code. The establishment codes were grouped into functional types and color coded. This map indicates linkages of establishments, and boundaries of districts with special relation to pedestrian flow.

Significant observations concerned the Retail, Chinatown, and Hotel-Entertainment Districts and the Midtown Residential Area. The Retail District stretching from Kearny to Powell Streets and from Market Street to Post and Sutter Streets represents an almost unbroken area of ground floor retail uses. Additional maps of major retail shopping goods establishments indicate the compactness and continuity of this area.

The Chinatown Commercial District has continuous ground floor retail uses along the Grant Avenue frontage from Bush to Sacramento Streets and north of Sacramento Street the commercial uses spill over and mix with residential, institutional, industrial and other uses along the Clay, Washington and Jackson Street frontages.

The Hotel-Entertainment District is characterized on the ground floor by a mixture of residential, hotel, retail, service and parking areas. The western portion of the areas designated as Hotel-Entertainment and the Midtown Residential Area have mixed retail, service, parking and residential uses on the ground floor with predominant upper story residential and residential-hotel uses. In this large area, the

commercial uses on the ground floor are service uses related to the predominant residential and residential hotel uses.

J. PARKING INVENTORY

A complete parking inventory of downtown has been accomplished as part of the Downtown Parking and Traffic Survey of the Bureau of Engineering, Department of Public Works. Work maps of parking supply, types of facilities and rate structures have been prepared. These maps will be used for further analysis when estimates of parking demand are available.

The number of off-street spaces in the downtown area has been increasing. In addition to 11,849 on-street spaces existing in the Downtown Parking and Traffic Survey Area, a supply which remains fairly constant depending on operational policy, there are now approximately 48,500 off-street spaces provided for employees, customers, or on a commercial basis. This contrasts to 22,245 off-street spaces estimated in 1948 and also accentuates the fact that parking is a major user of downtown land.

K. TRAFFIC GENERATION AND ATTRACTION AND THE MOVEMENT OF PERSONS AND VEHICLES

A complete Downtown Parking and Traffic Survey has recently been conducted by the Bureau of Engineering of the Department of Public Works. The results of that survey are being analyzed by the survey team and a great deal of valuable information is becoming available for the important circulation aspects of the Downtown Zoning Study. The following list of survey data has been requested from the Department of Public Works:

1. Off-street parking inventory - actual locations and number of spaces per facility, type of facility, rate structure.
2. Curb loading spaces, number of spaces by intersection.
3. On-street parking inventory - number of spaces per block and intersection by parking zone class.
4. Loading trips to and from each intersection.
5. Pedestrian movement - summary data.
   a. Total trips crossing cordon by direction.
   b. Walking distance by trip purpose.
6. Cordon summary data for vehicles and passengers, including passenger data from local transit and out-of-town bus sources.
   a. Auto
   b. Transit (from Muni, etc.)
   c. Truck
7. Trip data.
   a. Destination of persons after leaving vehicle, by intersection.
   b. Destination of vehicles by intersection.
   c. Trip distribution over time (morning, lunch, evening peaks).
   d. Trips by purpose by functional area.
8. Test of future traffic and parking generation by traffic analysis (generation factors).
   a. Parking generation by land use, or employment type.
   b. Traffic and trip generation by block front to 1975-1980, using Downtown Zoning Study attraction and generation inputs and traffic study network and traffic analysis programs.

9. Test of effects of selected off-street parking and loading policies on accessibility and traffic flow.

A table included in the Appendix (Table 8) shows totals for volumes of vehicles, passengers and pedestrians entering and leaving the downtown area in the peak hour (4:30-5:30 p.m.), and total figures for a 7:00 a.m. to 7:00 p.m. period. The cordon area used approximates the Downtown Zoning Study Area, although predominantly residential areas are excluded. Results of the 1965 cordon count indicate an increase since 1959 of approximately 60,000 persons entering downtown San Francisco daily, or an average increase of approximately 10,000 annually. It is of interest to note that the increase in persons over the past six years has been matched by an equivalent 1 to 1 increase in number of vehicles. This is highlighted by a declining persons to vehicle ratio, estimated at 1.2 on the average in 1965. These facts point to critical problems of vehicular congestion in the downtown area.

Movement to downtown from the remainder of the city and outlying areas was studied by origins and destinations in 1947, reappraised in 1960 and is presently under study by the Bay Area Transportation Study Commission. The 1947 data showed that approximately 30 percent of trips to the Financial-Administrative District were from outside San Francisco, the remainder from within the city. The Retail, South of Market and Civic Center areas had considerably fewer trips from outside the city averaging 14-16 percent. These patterns in the Financial-Administrative District were reaffirmed in 1960. The lower Market Street area attracted 71.2 percent of total trips from San Francisco, 12.4 percent from the East Bay, 10.9 percent from the Peninsula and 5.5 percent from Marin and the North Bay.

In travel to and from downtown, the 1965 cordon count was relatively similar in modes of transportation to the 1959 count with the major changes occurring between local transit and out-of-town buses, the former loosing proportionately and the latter gaining. There was also a considerably lesser number of trucks entering and leaving downtown in 1965 than in 1959 or 1947.

The cordon count information indicates an increasing total volume of persons and vehicles entering and leaving downtown San Francisco with a continued emphasis upon use of the automobile and commuting via out-of-town buses. There has been a modest increase in the numbers of pedestrians entering the core. The total number of persons entering downtown over the 7:00 a.m. to 7:00 p.m. time period (734,000 in 1965) is almost equivalent to the total population of the City and County of San Francisco.

The Downtown Parking and Traffic Survey team is now perfecting a program for computer analysis which will indicate a demand for parking spaces at given locations, the duration of parking, the walking distance of parkers, the origin of trips, and the accumulation of parked vehicles. This information will be computed, generally speaking, according to two variables which are of direct interest to the Downtown Zoning Study. These variables are:

1. The purpose of the trip - Ten categories of trip purposes are being used: shopping, business visiting, work, sales or service, freight load or unload, passenger load or unload, medical or dental, social, home, and miscellaneous.
2. Functional area within downtown - The parking data is accumulated by intersection, and an effort has been made to arrange the functional areas used in the analysis of the parking data to be as close as possible to those being used in the Downtown Zoning Study.

Information as to the origin and destination of Municipal Railway passengers and the purposes of their trips will also be available.

L. TRAFFIC FLOW

The Bureau of Engineering has up-to-date maps in the downtown area indicating traffic flow and the proportion of street capacity being used. These maps have been obtained for study purposes and will be used in greater depth when other movement data from the Downtown Parking and Traffic Survey is available in a final form.

The general flow of traffic in the downtown area indicates that streets in and near the Financial-Administrative District and Union Square are operating above practical capacity. Congestion in a north and south direction through the Financial-Administrative District is extreme. The movement systems north and south of Market Street are poorly related and flow across Market Street is impeded. This problem may be partially alleviated by the planned cut-throughs at Fifth and Seventh Streets.

M. POPULATION AND HOUSING

In the Appendix is Table 9 on population and housing. These data were derived from 1960 census tract summaries in the Programming Area Analyses of the Community Renewal Program. Census tracts were aggregated roughly to approximate the Downtown Zoning Study Area. A 196[illegible] estimate of about 82,000 population in the study area can be made by interpolating the 1960 and 1970 trend data in the table.

In 1960 approximately 31 percent of the San Francisco population 65 and over were in Census Tracts A and K located east of Van Ness Avenue and north of Seventeenth Street. The Downtown Zoning Study Area comprises the major part of these tracts. In 1964 of the 11,848 recipients of old age security payments 44.3 percent lived in these two downtown Census Tracts.

A very general summary of 1960 population, housing and social characteristics in the Study Area is drawn below from "Physical Problems Profiles" by Census Tract in the Programming Area Analysis reports of the Community Renewal Program and from preliminary monographs produced in the Rapid Transit Corridor Study of the San Francisco Redevelopment Agency and Department of City Planning.

In the Physical Problems Profiles, a relatively low score (higher quality) was recorded in all Census Tracts, except those south

of Market Street. The greatest percentage of substandard units was found south of Market where the percentage of substandard units was almost as high as the highest problem score (lowest relative quality) of any area in San Francisco.

Overcrowding, that is, more than one person per room, occurred in the two Census Tracts of Chinatown. Here the overcrowding rate was greater than the median San Francisco score, but considerably lower than the highest problem score areas of the city.

The highest problem score (lowest quality) in San Francisco was found in Census Tract A-16 in which 93.12 percent of the dwelling units shared bathroom facilities or had no bath. This Census Tract is bounded by Pacific, the Embarcadero, Sacramento and Grant. The Census Tracts below Market Street contained very high percentages of units which share bathroom facilities, 84.5 percent and 65.5 percent respectively. The highest proportion of vacant dwelling units occurred in the two Census Tracts south of Market Street (26.96 percent and 24.67 percent vacancy). The Study Area, as a whole, tended to show high deficiencies in community activities and protective (police, fire, etc.) functions.

Additional information on 1960 population and social characteristics was gotten from the Rapid Transit Corridor Study. The Tenderloin area referred to below is bounded by Market Street, Ellis and Leavenworth. The Midtown Residential Area is bounded by Leavenworth, Ellis, Powell, Bush and Van Ness and the Civic Center. The South of Market area includes more than the Downtown Zoning Study area South of Market, extending to Townsend and Seventeenth Streets.

The population density in the Tenderloin was one of the highest in the city with an estimated 401 persons per net acre of land devoted to residential use. This was five times the city's density of 78 persons per net acre. In the Midtown Residential Area the net density was 348 persons per net acre. The Tenderloin and the Midtown Residential Areas were typified by a high proportion of population over 34 and a high percentage of unrelated individuals. In 1960 only three percent of persons in the Midtown Residential and Tenderloin areas were non-white as compared to 18 percent for San Francisco. Educational levels of the Midtown Residential Area tended to be higher than the city averages and considerably higher than the Tenderloin which had lower averages of educational levels in comparison with the city.

Population density in the Chinatown Business Area (Pacific, Kearny, California and Stockton) was 401 persons per net residential acre and it is 250 in the Chinatown-North Beach Residential Area (Filbert, Kearny, Vallejo, Sansome and Pacific). In both the Chinatown Business Area and the Chinatown-North Beach Residential Area there was a decline in the population (19 percent in the former and six percent in the latter). The percentage of non-white in the Chinatown Business Area remained at 96 percent and in the Chinatown-North Beach Residential Area it jumped from 55 percent to 68 percent between 1950 and 1960. The 1960 census showed only seven percent of the families of Italian stock in the Chinatown-North Beach Residential Area. More than 15 percent of the Chinatown Business Area population is in the 65 and over category. Approximately 61 percent of the Chinatown

Business Area population were males with 50 as the median age, while for females the median age was 30.

The area south of Market Street was characterized by low average size of household (1.4 persons) and a high percentage of unrelated individuals (61 percent). Approximately one third of the 1950 population left the South of Market Area by 1960. The non-white population in 1960 was 31 percent as compared with 19 percent in 1950. There were 9,073 males and 2,927 females in 1960 as contrasted with 11,732 males and 3,974 females in 1950. All study areas shared a common denominator of large percentage of older persons, fewer children, higher percentages of unrelated individuals, and fewer families than for the city as a whole.

The Golden Gateway Redevelopment Project Area is anticipated to include 2,191 dwelling units upon completion of the planned development with approximately 4,600 persons expected to occupy the units. This will constitute a significant (roughly six percent) increase in residential population downtown, to occur mainly in the middle income groups.

Interviews with industry representatives indicate that the apartment house market is presently overbuilt and the present supply is in excess of current effective demand at prevailing price levels. Of the older stock modernized space remains more competitive with lower vacancy rates. Small units of one bedroom or efficiency size are the healthiest in terms of vacancy. The overall vacancy rates in all types of apartments indicate a period of adjustment with implications as to the rate and kind of new residential construction.

Present and proposed public policy calls for the diminution of residential activity south of Market Street within the Study Area. Approximately half of the dwelling units between Market Street and Bryant Street (921 dwelling units) are in the M-1 (Light Industrial) Zoning District which requires amortization of these residential uses by 1980. The proposed Yerba Buena Center Redevelopment Project would relocate approximately 250 families and 3,165 single persons in residential and hotel uses. Relocation of these persons along with programs to retrain or improve the social and economic welfare of this population may have significant impact upon the Midtown Residential Area and may generate public programs that will condition the demand for housing within the Study Area.

N. RETAIL, SELECTED SERVICES AND WHOLESALE TRADE

1. Retail Sales (See Tables 10, 11, 12 and 13 in the Appendix)

Since 1954 the growth of sales in San Francisco's Central Business District (CBD) as defined by the U.S. Bureau of the Census has occurred at a much slower rate than for the city as a whole or for the metropolitan area. In fact, the rate of growth has lessened for the CBD, whereas it has increased since 1958 for San Francisco and the metropolitan area. Sales in the CBD increased 10.9 percent from 1954 to 1958 and 7.6 percent from 1958 to 1963. The increase in total sales for the city from 1954 to 1958 was 6.5% and from 1958 to 1963 it was 18.2 percent. In the metropolitan area, the increase from 1954 to

1958 was 18 percent and from 1958 to 1963, 32.3 percent. Within the past five years, a significant decline in CBD sales has occurred in the automotive category, gasoline stations, furniture and eating and drinking places. San Francisco and the metropolitan area both registered increases for the same categories.

In the CBD and San Francisco, there was a slight sales increase in the general merchandise category while there was a substantial increase in the metropolitan area. The highest increases in retail sales in the CBD were in the "other retail", apparel, accessory and drug store categories. In 1963 of the total $489 million in retail sales in the CBD, the highest percentage still occurred in the category of general merchandise (28.2 percent) followed by apparel, accessory (23.3 percent), eating and drinking (18.1 percent) and other retail (13.5 percent).

As a share of metropolitan area sales, 37.4 percent of all apparel and accessory sales were in the CBD, and 79.4 percent of the city sales were in the CBD. General merchandise purchased in the CBD was 60.3 percent of all sales in the city and 22.2 percent of sales in the standard metropolitan area.

As the metropolitan area has grown, the share of retail sales in the CBD has declined. The CBD is still an important area for general merchandise, apparel and accessories, eating and drinking, furniture and other retail stores, both for San Francisco and for the metropolitan area. In these items of specialization, the general merchandise category has suffered the most from competition; furniture has declined in its share of the metropolitan area with apparel, eating and drinking, and other retail stores holding their own or declining slightly as a share of city and metropolitan area sales.

In comparison to other Major Retail Centers (as defined by U.S. Census of Business, 1963) in the United States, the San Francisco CBD is fourth ranked in total sales. In its percent capture of total metropolitan area sales (11.0 percent in 1963) it ranks with the central business districts of Boston, Pittsburgh, Philadelphia and Denver. The New York central business district in comparison, has a 15.5 percent capture of metropolitan sales.

The San Francisco CBD in the period 1958-1963 and in the longer period 1954-1963 was the leader in percent change in sales in major cities throughout the Nation (7.6 percent and 19.1 percent respectively). These data were prior to the closing of the White House Department Store and the Department Store Sales Indices of the Federal Reserve Bank have shown a negative trend since that closing. (The White House was one of seven stores used to calculate the index.) Interviews with the representative of the Retail Dry Goods Association indicate that the Association members have maintained a healthy growth rate of about seven percent per annum increase in net sales volume and that the advent of regional rapid transit is expected to increase pulling power from the East Bay.

The high national ranking in sales size, formidable capture of total metropolitan sales and past history of extraordinary vitality of the San Francisco CBD in a nationwide perspective underline the important role of this area in the future of downtown. Recent trends

would indicate continued vitality with more specialization, and modest growth prospects most likely manifesting in increased efficienc and remodeling of existing space.

2. Selected Services (For types of services included, see Tables 12 and 14 in the Appendix)

Between 1958 amd 1963 the CBD showed declines in receipts from motion pictures. There were increases in receipts from hotels and motels; however, the percentage growth in receipts in the CBD was less than in the city or metropolitan area.

According to the Census of Business, of the total number of establishments in the metropolitan area dealing with the selected services in 1963, 36.9 percent were located in San Francisco, as opposed to 41.7 percent in 1958. The city's share of receipts from these sources in 1958 was 58.2 percent but in 1963 the proportion declined to 52.3 percent.

Miscellaneous business services yielded the greatest dollar volume in receipts to both the city and the metropolitan area. This is followed by receipts from personal services in the metropolitan area and receipts of hotels and motels in the city. In both the city and the metropolitan area, automotive repair services receipts increased over 70 percent between 1958 and 1963. Miscellaneous business services receipts increased almost 80 percent in the metropolitan area and 52 percent in the city.

3. Wholesale Trade (See Table 15 in the Appendix)

Wholesale trade in the City and County of San Francisco declined in terms of the number of establishments. However, the city registered a higher percentage growth in sales between 1958 and 1963 than did the metropolitan area. Receipts from San Francisco wholesale trade comprised 65.9 percent of all sales in the metropolitan area in 1958 and 53.2 percent in 1963. The highest dollar volume in sales in both the city and the metropolitan area was in the category of groceries. Other important categories were machinery, metal and minerals, beer and wine, paper products, and other miscellaneous products. Over three-fourths of the metropolitan area wholesale sales for dry goods and apparel were in San Francisco in 1963. The city continued to lead in wholesale sales of farm products, hardware, machinery equipment, metals and minerals (except petroleum), beer and wine, paper and paper products, furniture, and other miscellaneous products.

O. HOTEL AND TOURIST ACTIVITIES

Data from the San Francisco Department of Public Health indicates an estimated 45,000 hotel rooms in the Downtown Zoning Study Area. Approximately 12,000-15,000 of these rooms are in the Hotel-Entertainment District. Approximately 11,000 hotel rooms are in the South of Market Area, the majority of these in small, older hotels with a high degree of dilapidation.

The San Francisco Convention and Visitors Bureau estimates that convention and group business is hosted by 40 principal hotels and 54

motels with a total room complement of 11,500[a]. Eight first class hotels furnish a large proportion of meeting rooms. Three of these hotels are in the Hotel-Entertainment District, two on Nob Hill closely proximate, and the other three are separately located.

The largest association of luxury and first class hotels in San Francisco reports on 12,000 rooms. Occupancy figures vary from week to week and range from 70-90 percent with some weeks recording higher or lower figures depending upon the season. Peak occupancy occurs in August when the tourist and convention seasons are operating at a high level. The low point occurs in December and January when tourist activity is off and convention activity drops to a low point. Average occupancy levels are considered high when compared nationally. Past trends have also indicated a relative stability in the total number of commercial hotel rooms available. The new construction has been limited and balanced off by conversions of some commercial hotels to a residential hotel status. A good number of smaller hotels have converted to the residential hotel status and several have specialized in facilities for the aged.

Interviews with hotel industry representatives indicate that parking is a major problem. Housing Code provisions requiring fire stair conversion are expected to accelerate closing of older hotels or changes in type of operation. High labor costs also act toward this tendency to convert to apartment hotels. Opinion varied as to prospects for any new hotel construction, ranging from little or no new construction to prospects for one or two new large hotels linked to proposed convention facilities. Motor hotels were thought to have the best prospect although there were differences in opinion as to the proper parking emphasis for convention oriented and general tourist-serving hotels.

The trends according to the Convention and Visitors Bureau have been toward larger conventions, attendance numbering in the thousands and in some cases up to 10,000. These larger affairs require a large number of rooms since hotel operators usually allocate only up to 60 percent of their space to conventions. For the most efficient convention use, larger hotels (1,200 rooms or more), close proximity of hotels and presence of public meeting space and related facilities are required.

Expenditure patterns for conventionaires studied on a nationwide basis has shown a linkage between hotels, food and beverage and retail sales establishments. The study shows an expenditure breakdown of 30 percent for hotel rooms and incidentals, 13 percent at restaurants in the hotels, 21 percent in other restaurants and for beverages and 15 percent in retail stores. The linkage of hotels, restaurants, eating establishments and retail stores in the Union Square area provides for these vital economics.

Locational linkages also exist between the prestige hotels and convention facilities on Nob Hill, the hotel area, and the convention

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a/ Extracted from report of "The Economic Performance of the Sports Area - Convention Center Proposed for the Yerba Buena Center," Economic Research Associates, May 17, 1965.

facilities in the Civic Center. Any plans for additional convention facilities such as proposed in Yerba Buena Center Redevelopment Project will have influence on the hotel areas.

Convention activity has shown higher growth rates over past years than general tourist activity. Both types of activity have shown continued growth, 1964 expenditures totalling $75.9 million for convention visitors and $73.2 million for other visitors reported by the Convention and Visitors Bureau. Expectations are for continued growth for both kinds of visitors, with higher potentials in the convention trade.

P. REVIEW OF UTILITIES CAPACITIES FOR FUTURE DEVELOPMENT

The major utilities systems providing sewerage, fire protection (water), telephone, electricity, gas and water service to downtown San Francisco were contacted as to possible capacity constraints that might tend to place operational limits upon future development. In all cases the response was negative and it can be assumed that capacity constraints based upon utilities systems (other than transportation in the broad sense of utilities) would not affect the downtown area if a fair measure of predictability of future levels can be maintained.

Q. PROJECTIONS OF SPACE USE AND EMPLOYMENT

A series of recent marketability and space projections made for several redevelopment projects, the Community Renewal Program and the Bay Area Rapid Transit District were reviewed as part of the Downtown Zoning Study. The purpose of this review was to assemble and evaluate this wealth of facts and estimates concerning future space demands in downtown San Francisco. These estimates, so evaluated, form a basis for understanding the kinds and levels of future growth and allow, in combination with the studies of present conditions and emerging trends in the previous sections, a dynamic context for the consideration of zoning controls.

The Commercial and Industrial Survey of the San Francisco Community Renewal Program produced comprehensive forecasts of all non-residential space requirements for detailed sections of downtown San Francisco to 1977. These projections were tabulated for the Downtown Zoning Study Area and then distributed into the downtown functional areas (see Tables 16 and 17 in the Appendix). The CRP space use projections were based upon employment projections (see Table 18 in the Appendix) and historical trends in land use changes in small areas of the city adjusted to estimates of the proportionate share of total growth for each area. Conversions from land use to space use were made by projecting average floor area ratios, modified in the financial and administrative area by a sample survey of new construction and employee/space indices.

Office Space Projections

The various projections of office space for the downtown area from recently performed studies are portrayed in Table 19 in the Appendix. These projections represent the results of several different types of analyses and projection techniques. The 1956 Market Analysis of Development in the Golden Gateway by Real Estate Research Corporation

studied downtown on three levels:

1. as a convenience business district for persons living and working in downtown San Francisco or nearby.
2. as the Bay Area's central business district for specialized professional, retail, entertainment, and business services, and
3. as a regional or continental commercial district serving national and international functions as a financial, administrative and convention capital of the western coastal United States.

This regional or continental function, comparable to New York and Chicago, was considered the greatest growth asset. The projection technique for office space, therefore, emphasized the uniqueness of the space market and studied the existing stock, character and the past trends of absorption of new space. The trend analysis was augmented by an important judgment by the analysts that a shaking-out period had occurred prior to 1956 in the financial and administrative area and that this process was substantially over. Organizations that did not require a central location but by virtue of historical precedent and space obsolescence occupied San Francisco office buildings had moved to other parts of the Bay Area by trading off lower rents and more space for a less central location. The projections assumed that these net losses in space had ended. Additional space needs for the expansion of financial institutions already in the financial and administrative area were added to the adjusted absorption trends. Projections were for an average annual increase of 250-300,000 square feet of net rentable office space.

A re-analysis of the Golden Gateway project area by Western Real Estate Research was done in 1958. The projection techniques were essentially the same as in the 1956 project and brought some of the trend data up-to-date. Through detailed analysis of proposed building projects and the character of recent moves, an efffective demand absorption rate of approximately 338,000 square feet per year of office space was derived and the projections for the project area were reaffirmed.

In making this projection, a second technique also corroborated the previous finding. A ratio technique assuming a growth relationship to the Bay Area was devised with a resultant ratio of 6.1 square feet of central office space per capita for the entire Bay Area. Using the core cities of San Francisco, Oakland, and San Jose as a base, it was ascertained that approximately 94 percent of the total office space in those three cities was in San Francisco, and therefore, a conservative absorption of 75 percent could be used to project future growth.

The report in 1963 for the South of Market Redevelopment Area by Roy E. Wenzlick and Company used a ratio projection technique based upon total metropolitan area growth and a share of activity in the downtown area vis-a-vis other competing centers. The projections of office space were influenced by these factors of demand:

1. the need to fill a backlog created by the absence of office construction during the 1930's and 1940's.
2. the rapid increase in white collar workers,
3. the trends toward utilization of more space per worker,
4. the prestige value of new space.

Projections for the San Francisco-Oakland Metropolitan Area based upon square feet of office space per capita were compared to per capita studies in New York City and northeastern New Jersey. An alternate technique correlating space demand with expected growth in office employment in the metropolitan area was also used. By studying the share of San Francisco in past growth in the metropolitan area and relating it to competition in Oakland, an average annual growth rate was derived using both the population and employment projections. This rate was approximately 650,000 square feet of net rentable office space per year.

In 1965, the Real Estate Research Corporation prepared a marketability analysis of the sites and proposed uses planned for the Yerba Buena Center Redevelopment Project. The market for office space was studied on the supply side by a survey of 212 office buildings with a total of over 15 million net square feet of space, 9.6 million square feet of which was in the financial and administrative area. According to their results about four-fifths of all space additions from 1946 were in the financial and administrative area. An average of 329,000 square feet of net rentable space was constructed annually from 1955-1964. This 27.4 percent growth rate in the past 10 years approximately equalled the growth of metropolitan population.

To project future office space demand an office space index based on metropolitan area population was related to population forecasts. It was suggested that this method underestimates growth since office space and employment may increase at a faster rate than population in cities with regional office markets. An alternate demand estimate based on employment growth rates in finance, insurance, real estate and service occupations was then approximated by judging the growth from 1958-1963 in employment included in a sample survey of 28 buildings in the San Francisco downtown area. The ten year gain was projected at a growth rate of 455,000 square feet of net rentable office space.

The study then investigated current demand factors that would operate to enlarge the market demand by 1970. A secondary source totaling about 500,000 square feet was based upon the potential "combing out" of older, obsolescent space by the advent of modern competitive space. Another factor that was judged to increase the absorption of space was an "undoubling" effect based on an employee/space ratio that had decreased to a net of 124 square feet per employee in sample buildings studied in 1956 and 1965. This element of demand was estimated at 2 million square feet by 1970. Total demand to 1970 was estimated at four million square feet of net rentable space (2.5 million current demand, 1.5 million growth to 1970) or an average annual rate of 800,000 per year.

It is to be noted that the 1.5 million square feet of growth demand to 1970 as indicated above, implies an effective period of slightly over three years during 1965-1970. This growth demand could

be increased to 2.275 million square feet by applying the 455,000 average annual growth rate previously ascertained to the full five-year period. This interpretation of the total space demand estimate was not made as it would also involve evaluation of the "combing out" and "undoubling" effects. As the purpose of this review was to ascertain longer run total demand, the total demand of 6.275 million square feet of space by 1975 was assumed to represent a ten year estimate.

In summary, the 1965 Real Estate Research report indicates a projected growth of space inventory of approximately 455,000 square feet of net rentable office space annually from 1965-75. When other elements of demand are considered the total projection to 1975 is 6.275 million square feet or on the basis of a ten year average, 630,000 square feet of net rentable office space annually (see Table 19 in the Appendix).

The Community Renewal Program used a more comprehensive projection technique accounting for a cross-section of all projected employment and most non-residential uses. The growth trend and proportionate share analysis, using land use data as a base, was not well suited to the downtown office projections and therefore special consideration was given by additional study of office space growth. In conversion of land use projections to space use projections in the financial and administrative area, the use of low-overall floor area ratio assumptions produced a conservative estimate of approximately 6.8 million square feet of gross office space by 1977 or an average annual increase of 370,000 square feet of net rentable space (net rentable is 77 percent of gross space)

Hotel Projections

The 1956 Real Estate Research report also studied hotel inventories and vacancy rates in San Francisco, concluding that high occupancy for conventions in San Francisco indicated a potential for a large 1,000-1,200 room hotel and convention facilities that might well be located in the hotel district, Nob Hill or in the Golden Gateway project area. As an alternative, the report recommended a 300 room motor hotel if the convention facility were not included.

The advent of the Hilton Hotel project caused a re-evaluation in the 1958 Western Real Estate Research study of the hotel projection in the 1956 study and a new recommendation that only a motel of 250-300 rooms be considered.

The 1965 Real Estate Research report indicated recent hotel construction would have a short-term effect of depressing occupancy rates. The analysis did, however, indicate a market for a facility of 200-300 rooms or 40-50 rooms, with location and image the key factors in recommending a 80-100 room motor hotel in the Yerba Buena Project Area.

Residential Projections

The 1956 Real Estate Research report studied the housing market showing a possible absorption of 30,000 units per year for the Bay Area. A study of employees in firms located within one mile of the Golden Gateway was used to develop the desirability of close-in residential development. Survey results showed approximately 7,500 units as effective demand. To avoid attempting to absorb too much of the total market over a relatively

short time, a policy of 1,500 units within the Golden Gateway was recommended.

A study of residential vacancies in the 1958 Western Real Estate Research re-appraisal in the Golden Gateway indicated a low vacancy level at that time and the previous findings were supported. Trends at the time caused the second report to recommend the inclusion of larger units and a higher rental schedule.

The San Francisco Community Renewal Program designates as a target an annual construction rate of approximately 3,400 residential housing units of all types for the city over the next 12 years as compared to an average annual rate of 2,900 for the period 1960-63. Part of this new housing construction is recommended to be new cooperative or rental quarters similar to the combination high-rise apartment, garden and duplex apartments in recent redevelopment project areas. The CRP calls for new construction of approximately 15,000 rental units by 1978 with approximately one-third in the one or two-room small household category for low and lower-middle-income housing. Downtown residential areas could provide a large portion of these units.

In the long run, a strong demand for inlying rental housing of a type suitable in these areas may be created. Additional demands may reflect public housing policy for the elderly. Residential projects in the Golden Gateway, Western Addition, and south of Market redevelopment areas will condition the market in these areas, as would the development of the proposed University. These public actions will strongly bear upon the re-use of revitalization of the downtown residential areas.

Retail Projections

In the Wenzlick study, retail sales were projected based on studies of share of metropolitan growth with an estimate of capture for the CBD based upon the imminent advent of the rapid transit system, completion of the freeway system in the city and adequate and inexpensive parking space competitive with suburban shopping centers. A leveling off at 20 percent of the capture of metropolitan area sales by the CBD was projected, indicating potential expansion of retail space.

The Community Renewal Program Commercial and Industrial Study projected a decline of retail floor space in the downtown area. This projection was based upon an expected decline in retail space and employment in downtown and in the city as a whole. These conflicting estimates of future growth are partially due to a sales approach used by the Wenzlick study and a space use approach in the CRP. Shifts from general merchandise to specialty items and hard to soft goods could account for increasing sales per square foot and less space doing more total sales. Part of the difference may also be due to differing estimates of the impact of regional rapid transit on the total retail growth in the period after 1970. The future disposition of the total retail inventory will depend upon these factors of sales efficiency and potential capture but in any case the magnitude of projected net change in the Retail District (Wenzlick: 300,000 square feet addition, CRP: 300,000,square feet decline) and the expected character (shifts to specialty and soft goods) is such that any new growth is anticipated to occur:

a. through conversion, remodeling or increasing efficiency of existing space, or
b. by new "mixed" developments where retail uses accompany office and other uses.

Other Space Projections

Space and employment projections from the Community Renewal Program indicate the following trends for downtown and the entire city by 1977:

1. Industrial employment in the city is expected to continue to decline absolutely and relatively; this is reflected by an anticipated total decline in this type of space use downtown, with the exception of a modest net increase in light industrial use in the South of Market-West functional area.
2. Business Services, Finance, Insurance and Real Estate, Government and Auto Repair employment are expected to be the growth sectors in San Francisco, increasing absolutely and relatively to compensate for the decline mentioned above; these trends are reflected by a significant growth in office and public space uses throughout the downtown area, but auto repair space is a declining space use downtown, indicating growth to occur in other areas of San Francisco.

Total Non-Residential Space Projections

Recent space estimates for the Bay Area Rapid Transit District by P.B.Q. & D. Inc. an affiliate of Parsons, Brinkerhoff, Quade & Douglas, Engineers, are shown in Table 16 in the Appendix and compared to CRP-derived projections. The Rapid Transit District estimates were made by an estimation technique, ascertaining land available in small segments of the downtown area and judging potential development or rebuilding to new levels of space use. Land available for development was studied for each block and expert opinion was used to assess future development potentials. An average floor area ratio for each segment, based upon judgment of the potential development, was assumed and general levels of space use were calculated.

The Rapid Transit District estimates to the 1975 horizon year have a high degree of comparability and are generally slightly higher than the 1977 CRP projections, indicating their moderately higher overall growth rate. In the Financial-Administrative District, Rapid Transit District estimtes of a total of 24.4 million square feet of gross floor area by 1975 compare to 1977 projections based upon the CRP of 23.2 million gross square feet. The Rapid Transit District estimates would indicate an average annual growth rate of 360,000 square feet of gross total floor space in the next ten years in the Financial-Administrative District. In the Retail District the Rapid Transit District estimates are significantly lower than those derived from the CRP, and would indicate an absolute decline in total floor space. Significantly higher growth rates are reflected by the Rapid Transit District estimates in the Outer Market and South of Market-West Areas.

Growth Indices Based upon the Downtown Zoning Study Space Inventory

To complete the assembly of projections, the most recent inventory of downtown office space described in previous sections of this report was converted to an up-to-date per capita index. The 22.1 million gross square feet of office space in the total Financial-Administrative District Space Capacity Study area (see the following subsection of this paper) when related to the six-county metropolitan area population of approximately 3.2 million (1965 estimate of population of Alameda, Contra Costs, Marin, San Francisco, San Mateo and Solano Counties), results in an index of 6.9 square feet of gross office space per capita.

If the previously discussed projection technique relating office space growth directly to metropolitan population growth is applied, an estimate of future demand will result, assuming that a constant index will hold for the next 15 years. (With the forces of increasing service emphasis in the economy and increasing space requirements per employee working toward increasing the per capita office space index, and the suburbanization of office space and rise of competing centers working to decrease the index, it is difficult to assess the reliability of this assumption.) An increase of 1.3 million population in the six-county area by 1980 would imply an increase of 9 million square feet of gross office space in the Space Capacity Study area. This growth could be represented by an average annual increase of 600,000 square feet of gross office space over the next 15 years.

Using the employment growth technique, a 39 percent increase in financial, insurance, real estate, and business service groups projected by the CRP for San Francisco by 1977 would result in an increase of 32,000 employees over the 1964 estimate of 82,000 in the Financial-Administrative District, assuming the growth of this district on par with the total city. At gross office space per employee indices of 200-220, an increase of 6.4 to 7 million square feet or an average of about 500,000 square feet annually could be expected in the Financial-Administrative District to 1977.

A figure of 200 gross square feet of floor space per employee has been chosen as the best estimate of the future ratio of floor space to employment, although it would be reasonable to speak in terms of a range of from 185 to 220 square feet per employee.

Several sources have been examined as to the existing space ratios. Since most of these other sources quote ratios computed from net rentable floor space rather than gross floor space, it has been necessary to use a conversion factor from net to gross square footage. A check of office buildings recently constructed in San Francisco shows a relationship of from 60 to 87 percent net to gross floor space, with the average at 77 percent. Ratios for the largest buildings run higher, but the average was chosen as an intentionally conservative figure. This conversion factor of 77 percent was used to change net square footage to gross square footage, and all figures cited below and in following sections are in terms of gross rather than net floor space. No special recognition was given to vacancy factors, since most figures do not specify whether vacancies are taken into account, and it is assumed that the vacancy factor is intended to be absorbed in the overall ratio of floor space per employee.

Recent figures from the National Building Owners and Managers Association show 204 square feet per employee nationwide, but with a considerably lower amount of space (165-175 square feet per employee) for the older buildings. BOMA figures for San Francisco, at the same time, show an average of 185 square feet for all buildings; this low San Francisco figure may be explained on the basis of the high density of development in this city, and perhaps the greater average age of its office buildings. The 1965 report of the Real Estate Research Corporation shows, on the basis of a sample survey, an average of 161 square feet for the buildings checked, but from 195 to 240 square feet for buildings of the most recent construction. In 1964, in a survey made prior to the Downtown Zoning Study, the Department of City Planning found considerable variations in space per employee ratios, with the smaller and older buildings averaging less space per employee than larger and newer buildings. In buildings of the sizes now most commonly being built (over 100,000 square feet of net rentable office space per building), the ratio was 200 gross square feet per employee. In buildings constructed in a recent ten-year period (1950-1960), the 1964 ratio was 220 square feet per employee.

All of the above figures are based upon something less than the total inventory of office space in the Financial-Administrative District. Data used in the Downtown Zoning Study, covering all buildings, bear out the ratios found. In this study, the functional area designated for statistical purposes as the Financial-Administrative District (see map in Appendix) was found to have an overall average of 220 square feet per employee. On the outer edges of this district the ratio ran higher, while in the primary core area (bounded by Kearny Street, Sacramento Street, the east frontage of Battery Street and Market Street) the ratio was 196 square feet per employee. Larger buildings as a class and newer buildings tended to have slightly more space per employee than smaller and older buildings.

Projections of trends in these space ratios might be said to indicate a gradual increase in the amount of space per employee in the coming years. This would occur as firms abandoned (and perhaps left chronically vacant) the older, less desirable space in favor of newer, larger buildings in which they were able to occupy more space per employee. This is the so-called "undoubling" effect. But it is questionable whether for any given firm this "undoubling" would be more than temporary, since rapid expansion of the firm could easily absorb the added space and return the ratio of space per employee to its former lower level. The result, therefore, would be a "sliding" range of space ratios, with space in all buildings tending to become more crowded as it ages, and the overall average space ratio including buildings of all ages remaining approximately the same. Furthermore, the data developed in the Downtown Zoning Study indicate that ratios in the primary core area are relatively low, reflecting a high cost of space in this area, a differential which will undoubtedly continue in the coming years.

Under this type of analysis, the ratio of 200 square feet per employee chosen for projection purposes is not unreasonable. If a range of estimates is sought, however, a high ratio of 220 square feet per employee may be used, resulting in a ten percent increase in the projection. Using this high ratio, the increase in the stock of office space to 1977 based upon an employment increase of 32,000 would be 7,040,000 gross square feet rather than the figure of 6,400,000 which results from a ratio of 200 square feet per employee.

R. SPACE CAPACITY STUDY FOR THE FINANCIAL - ADMINISTRATIVE DISTRICT

Nature and Purpose of the Survey

In order to determine the capacity of the Financial - Administrative District to accommodate additional office space, a detailed survey was made of physical conditions in this area and its periphery. The purpose of this survey was to measure the quantity and size of sites which may be considered susceptible to new development.

The survey was confined to the present core of high-intensity office development, and the areas adjacent to this core into which such development is now expanding or may be expected to expand within a few years. No comparable study was made of sections of the downtown area other than the Financial - Administrative District, because the nature of those other sections is such that the density of building development is not a prominent issue. The thrust of the space capacity study, then, was directed toward the question, "Just how much high-density office space can be accommodated within an intense and reasonably compact Financial - Administrative District?"

Area Covered

In the Appendix to this Paper is a map entitled "Financial and Administrative District Space Capacity Study" which indicates the areas surveyed. It is important to stress that these areas were chosen for computation purposes only, and that planning judgments as to the future extent of the Financial-Administrative District or as to the future intensity of development in the various areas were not a part of the survey.

The areas surveyed may be briefly described as follows:

Area A: A 16- block area bounded by Market, Kearny and Sacramento Streets, and by a line running through the centers of the blocks between Battery and Front Streets. This area may be considered the present primary core.

Area B: A secondary core area surrounding Area A which includes the west frontage of Kearny Street and some adjacent properties, the blocks between Sacramento and Clay Streets and east to Davis Street, the south frontage of Market Street, and the New Montgomery Street corridor south to Howard Street.

Area C: An additional area bounded on the north by Washington Street (but including the Appraisers and U. S. Customs Buildings), on the east by the Embarcadero, and on the south by Mission Street.

Area D: The south side of Mission Street between Spear and New Montgomery Streets.

Area E: An area bounded by Market and Howard Streets, the New Montgomery Street corridor, and a line to the west of the west frontage of Fourth Street, most of which is included in Yerba Buena Center Redevelopment Project Area D-1.

These five areas were surveyed separately because some of the criteria for estimating space capacity differ from one area to another. All five areas may be considered, however, to have a high potential for new office development. Areas A and B are in the present core. Area C, though formerly at the fringe of the downtown office area, now contains a considerable number of current office building projects. Area D is a logical extension of present Mission Street development south to the Trans-Bay Terminal, which forms a distinct southern barrier. Within the area designated here as Area E, office buildings are contemplated in the Yerba Buena Center Redevelopment Project.

Criteria

In carrying out the survey on a parcel-by-parcel basis for the five areas just described, a series of criteria was used to separate those parcels which might be considered susceptible to development from those that are not. These criteria were used in combination, and the result for each parcel was an index of relative susceptibility to new development.

The assembly of information used in this study began with the data collected in the survey of condition of commercial and industrial structures conducted as part of the Community Renewal Program in 1964. This information was filled out, updated and added to in the Downtown Zoning Study, and a special data bank was developed by computer. These data were further checked and added to in this Space Capacity Study for the Financial-Administrative District.

The criteria for the Space Capacity Study were as follows:

1. Number of stories in present structure. Through historical experience, it was assumed that no existing structure of ten stories or more will be replaced in the 15 to 20 year period covered by the Downtown Zoning Study. There are now a few isolated exceptions to this rule where the removal of structures of ten stories or more is known to be actually contemplated.

   In addition, for purposes of this survey, it was assumed that generally in Areas B, C, D and E structures of five to nine stories are also not susceptible to replacement, unless a development proposal for the site has been announced. This is a conservative assumption, since many structures of five to nine stories in these areas are obsolete and a number have actually been replaced in recent years. The assumption is especially conservative with regard to Area B, the secondary core.

2. Age of present structure. Structures of any size constructed in the last 30 years were considered not susceptible to replacement unless a project for their replacement has been announced.

3. Major alterations. From a study of building permit applications for the past 20 years, the structures which have had major alterations were identified. Major alterations were considered to be those totaling ten dollars or more per square foot of gross floor area in the period 1945-1955, or five dollars or more per square foot of gross floor area in the period 1955-1965. Alterations of this magnitude were assumed to make the structure not susceptible to replacement unless a project for replacement has been announced, or unless the structure has a low ratio of building to land assessment as described under the seventh criterion below.

4. Major public or institutional buildings and uses. Most such properties were considered not susceptible to development.

5. Overriding historical or architectural significance of existing structure. This factor was considered in relation to all buildings, and resulted in the removal of several parcels from the list of those susceptible to development.

6. Major retail stores. Although the areas surveyed do not include the concentrated retail district, several parcels on the edge of the Financial-Administrative District were eliminated from the susceptible category because of the existence of multi-story retail stores.

7. Value ratio. Where any of the first three criteria described above (ten or more stories, age of 30 years or less, or major alterations) caused a parcel to be classified as not susceptible to development, a check was made of the ratio of assessed value of building to assessed value of land. Where the total building assessment was less than the total land assessment for a parcel, this was considered to cancel out the other three criteria and changed the classification of the parcel to susceptible.

   In fact, however, no building either ten stories or higher or constructed within the last 30 years was found to have such a low building-to-land assessment ratio, and this ratio served to cancel out the third criterion, that of major alterations, in only a few instances. The result was to moderate the major alterations criterion in the case of some smaller buildings.

   Where buildings in Areas B, C, D and E were placed in the non-susceptible category on the basis of a height of five to nine stories (as described under the first criterion above), the assessment ratio was not checked, as this classification of five to nine story buildings as non-susceptible in these areas was based upon a deliberately conservative assumption.

8. Condition rating. Under the Community Renewal Program survey of the condition of commercial and industrial structures, a condition rating index had been computed for each property. This rating was expressed as an index of from 1 to 6, with the index of 1 considered "best" and the index of 6 considered "worst". Many of the factors used in developing that condition index are implicit in the first seven criteria just described. Where properties were classified as not susceptible to development under the above criteria (other than on the basis of a height of five to nine stories in Areas B, C, D and E), the condition rating was checked. In no such case was a condition rating of 5 or 6 (the two "worst" categories) found for these properties, and therefore no change in classification of a property was made as a result of the condition rating criterion.

Method of Computation

With all properties in the survey areas classified as either susceptible or not susceptible to development under the above criteria, the properties were totaled to determine space capacity. Separate totals were made for the five survey areas, and in each of these areas there was also a separate accounting of susceptible properties containing buildings, those containing no buildings, and those for which definite development proposals have been announced.

Within these categories, the land area in susceptible parcels was totaled, as well as the amount of floor area presently contained in buildings on these susceptible parcels. Special attention was given to present floor area on susceptible parcels that is devoted to offices, since in any estimate of future office space capacity the displacement of such existing office space by new construction must be taken into account.

In order to show the general range of space capacity, a hypothetical floor area ratio (the ratio of the gross floor area of a building to the area of the lot it occupies) was set at 16:1 for new construction. This ratio was applied to the total area of land susceptible to development in order to determine the total floor space that might be accommodated. As explained below, other floor area ratios lower than 16:1 were also used.

Qualifications

An effort has been made in this survey to take into account as many factors as possible and to exercise caution in the assumptions made. As in any survey of this type, certain qualifications must be made as to the method. None of the qualifications in the list which follows, however, are considered to affect the overall merit or validity of the conclusions reached in the survey.

1. Since some of the information on the 856 properties included in the survey was coded for computer programming, certain minor errors and overgeneralizations may have occurred. For example, some buildings classified as office buildings may contain ground floor retail space and vice-versa, and this will slightly affect the office space totals. Errors of this type tend to cancel one another out, however, and the net error is not significant.

2. Some of the criteria listed above may have a broader or narrower overall effect on future development than has been assumed in the survey. For example, some buildings of ten stories or more may be replaced in the primary core area (Area A), and some additional buildings may be preserved on the basis of their architectural or historical significance. Certain uniform rules for susceptibility or non-susceptibility must be used, nevertheless, and the criteria chosen are thought to have general validity.

3. In the construction of office buildings, some minimum parcel size is required. The figure used is often 8,000 or 10,000 square feet of land. No separate computation has been made as to sites larger or smaller than this minimum size. It has been found that in Area A, however, nearly all the susceptible properties would, if assembled for construction, constitute sites of at least 10,000 square feet; in other cases, sites in Area A that are smaller than 10,000 square feet could be used for expansion of adjacent buildings.

   In areas B, C, D and E, the great majority of the susceptible land area would be in sites of at least 10,000 square feet if so assembled. Of the remainder, most tends to be broken up by isolated buildings of five to nine stories. Since single five to nine story buildings of this type might be considered marginal, it seems probable that such buildings could be removed for the assembly of large sites.

4. There are many strategic and subjective factors which cannot be taken into account in the survey. In some cases, no developer will be able to place himself in a position to develop certain properties, since existing owners may be unwilling or unable to sell some properties which are otherwise susceptible to development. In other cases, a decision may be made to remodel an existing building rather than remove it, or to hold property for development in the distant future. The existence of these strategic and subjective factors does not negate the method used in the survey, but serves only to qualify the results to a certain extent.

5. The Space Capacity Study deals in terms of space for office uses, but nevertheless some other non-office uses will remain in the areas surveyed. In general, however, non-office uses will tend to be removed as the Financial-Administrative District continues to develop, with the exception of some

space for retail sales and services and automobile parking. These latter two types of uses, however, can be absorbed in the lower floors of future office buildings, and the need for their presence will not greatly inhibit office development. Parking will be a greater user of floor space than retail sales and services, and at present accessory parking for the use of the building in which it is contained is not counted in determining the permissible size of the building under the floor area ratio formula. On this basis, the estimates of office space capacity are not affected.

6. In the computations a floor area ratio of 16:1 is used initially throughout (except in the Golden Gateway Redevelopment Project), and although certain sites may be developed to the 16:1 intensity surely not all of them will be. The average floor area ratio will therefore be something less than 16:1. This is particularly so in a portion of Area C along Mission Street and in Area D, where the present C-M zoning permits a floor area ratio of 9:1 rather than 16:1 as in the C-3 district. Portions of this C-M district have recently been reclassified to C-3 to permit more intensive development, however, and other portions may later follow suit.

   Another fact not taken into account in the use of a uniform 16:1 ratio for computation purposes is that on a corner lot (within 125 feet of a street intersection) the ratio currently applying in C-3 is 20:1, due to the 25 per cent corner bonus provision now in effect for such lots. On this basis the present permitted floor area ratio averages more than 16:1.

   Despite the drawbacks of the uniform 16:1 figure, this ratio does provide a uniform measure of future development potential under present zoning requirements. For comparative purposes, however, two lower average ratios of development are also used in the analysis which follows, reflecting existing intensities of development rather than the full intensity permitted.

Results of the Survey

The results of this Space Capacity Study are more fully set out in Tables 20 and 21 in the Appendix to this Paper. These results may be summarized as follows:

1. Present intensity of development. There is a total of 6,487,669 square feet of land in the five areas surveyed, occupied by a total of 30,270,900 gross square feet of buildings, (excluding any space devoted to apartment units), for an overall floor area ratio of 4.7:1. Present floor area ratios for the individual areas range from a high of 7.5:1 in Area A to lows of 3.0:1 in Area D and Area E. In the five areas as a whole, 22,140,000 gross square feet of floor space

is in office use, or 73 per cent of the total. This constitutes the great majority of the office space in the downtown area, although significant concentrations exist elsewhere as described earlier in this Paper, especially in the medical office area to the west along Sutter and Post Streets and in the Civic Center area.

2. Properties not susceptible to development. Properties in this category for the five areas total 2,900,702 square feet of land area, containing 22,395,400 square feet of floor space, 19,141,400 square feet of which is in offices. This means that 45 per cent of the land in the five areas now accommodates 74 per cent of the total floor space and 87 per cent of the floor space that is in office use. The average floor area ratio for these non-susceptible properties is 7.7:1.

3. Properties for which definite development proposals have been announced. Aside from the sites on which construction was already under way by July 1, 1965, there is a total of 660,976 square feet of land area in the survey areas already committed to new construction, including 374,287 square feet in the four undeveloped commercial blocks of the Golden Gateway Redevelopment Project and 281,814 square feet in eight other major sites. Using a floor area ratio of 8:1 in the Golden Gateway blocks, actual floor areas to be built where plans have been formally submitted for other sites, and a floor area ratio of 16:1 for the remaining sites (9:1 in one site located in C-M), the properties in this category can accommodate a total of 6,235,857 square feet of floor space. Only 228,500 square feet of existing office space would be removed for these new buildings, giving a net possible gain in office space of 6,007,357 square feet. These figures do not include any gain in space in Area E, where some office construction is contemplated in the Yerba Buena Center Redevelopment Area.

4. Other properties susceptible to development. In considering properties in this category, Areas A, B, C and D should be taken separately from Area E, since the latter is subject to public redevelopment activity. Within Areas A, B, C and D, the survey shows a total of 313,738 square feet of land now in open use (nearly all of it devoted to parking), and 1,766,123 square feet of land occupied by susceptible buildings of one to four stories (one to nine stories in Area A). This 2,079,861 square feet of land at a floor area ratio of 16:1 could be converted to 33,277,776 square feet of floor space. Full use of these properties for new construction would result in displacement of 2,680,100 square feet of present office space; if this space is subtracted from the total the result could be a net increase of 30,597,676 square feet of office space.

   It is interesting to note that when the same computations are applied to Area A alone, this primary core area yields

8,672,512 square feet of office space, or a net increase of 7,236,012 square feet over that existing at present. This considerable capacity for increase is due to the fact that this 16-block primary core area has 36 per cent of its land in sites considered susceptible to new development in the survey (43 per cent if the future Bank of America site is also counted as susceptible property).

In Area B, the secondary core, the computations show a capacity of 8,550,832 square feet of new office space, a net increase of 7,803,832 square feet. These figures are based upon an assumption that existing buildings of five to nine stories in Area B will not be removed. With the sites occupied by five to nine story buildings also considered susceptible in this area, there would be an additional capacity of 6,773,152 square feet of new office space, a net additional increase of 5,108,152 square feet. It is probably more realistic to assume that five to nine story buildings in Area B are in fact susceptible to removal.

If Area E were computed in a manner similar to that used for the other areas, the net yield in new office floor space could be an additional 13,463,080 square feet. However, redevelopment plans covering most of this area provide for approximately 625,000 square feet of office space mixed with other uses, yielding a net increase of only 518,500 square feet of office space over that now existing in the redevelopment area. Using the normal computation for the properties within Area E but outside the redevelopment area, an additional net increase of 2,079,224 square feet of office space is indicated. This figure added to the net increase within the redevelopment area yields a total net increase for Area E of 2,597,724 square feet.

In the course of the calculations for the space capacity survey, an additional area, called Area F, was considered. This area is not shown on the map in the Appendix, but runs along California Street up the east slope of Nob Hill and includes all of Assessor's Blocks 242 and 257 and the western portions of Blocks 241 and 258. Using the same criteria as those applied in the remainder of the survey, and taking full advantage of the C-3 zoning which presently applies to these blocks, the properties there could yield an additional net increase in office floor space of 1,939,344 square feet. This is only a minor increase compared with the space capacities of Areas A, B, C, D and E as described above.

Recapitulation

The table which follows in the text recapitulates the above calculations and expands upon them by use of two other floor area ratios for illustrative purposes. In each case there are shown, for

each portion of the Space Capacity Study area, the net capacities for increase in office space, with cumulative totals. The net gain for sites with definite development proposals is also shown. (For a more extensive table showing the derivation of these figures, see Table 21 in the Appendix.)

The three illustrative floor area ratios used are:

1. A ratio of 16:1, the use of which was described previously.

2. A ratio of 10.3:1, which is the present average floor area ratio of the non-susceptible properties in Area A. Such a ratio would assume a capacity on new sites in all areas, regardless of the floor area ratio that might be permitted by law, which was no greater than the density that has already been reached in the primary core by buildings not considered susceptible to replacement.

3. A ratio of 7.5:1, which is the present average floor area ratio of all properties, both susceptible and non-susceptible, in Area A. Such a ratio would assume a capacity on new sites in all areas, regardless of the floor area ratio that might be permitted by law, which was no greater than the existing average density of all buildings in the primary core area.

The present office stock in all five areas surveyed is 22,140,000 square feet for all properties. It can be seen from the table that follows that a combination of the sites for which there are definite development proposals plus other susceptible sites at a floor area ratio of 16:1 would provide for a tripling of the present office stock in the Financial-Administrative District. Development at an average floor area ratio of 10.3:1 would provide for an increase to two and one-third times the present office stock, while development at an average floor area ratio of 7.5:1 would provide for a doubling of the present office stock. The same types of computations could be performed at other illustrative floor area ratios; for example, an average ratio for new development of 7.7:1, which is the present average ratio of all non-susceptible properties in Areas A, B, C, D and E combined, would result in development to a level very similar to that resulting at 7.5:1 as shown below.

RECAPITULATION SHOWING NET GAIN IN OFFICE SPACE
UNDER VARIOUS LEVELS OF AVERAGE DEVELOPMENT

Portion of Space Capacity Study Area	Definite development proposal sites,[2] net gain in space	Net capacity of other sites susceptible to future development					
		At 16:1 F.A.R.		At 10.3:1 F.A.R.		At 7.5:1 F.A.R.	
		This area	Cumulative total of areas	This area	Cumulative total of areas	This area	Cumulative total of areas
Area A	1,310,020[3]	7,236,012		4,146,430		2,628,740	
			7,236,012		4,146,430		2,628,740
Area B[1]	1,484,092[4]	12,911,984		7,452,815		4,771,118	
			20,147,996		11,599,245		7,399,858
Area C	3,213,245[5]	10,826,544		6,832,218		4,870,093	
			30,974,540		18,431,463		12,269,951
Area D	0	4,731,288		3,006,230		2,158,823	
			35,705,828		21,437,693		14,428,774
Area E	518,500[6]	2,079,224		1,316,769		942,230	
TOTAL	6,525,857		37,785,052		22,754,462		15,371,004

1/ 5-9 story buildings in Area B considered susceptible.
2/ Announced to January 1, 1966.
3/ Bank of America (at 16:1).
4/ Two blocks in Golden Gateway Redevelopment Project (at 8:1); Insurance Center Bldg.;Standard Oil Bldg. addition (at 16:1).
5/ Two blocks in Golden Gateway Redevelopment Project (at 8:1); Bechtel Bldg.; Matson Bldg.; Montgomery Block site (at 16:1); PG & E addition (at 9:1 now permitted by C-M zoning); Old Hall of Justice site (assuming only 20,000 sq. ft. of offices).
6/ According to Yerba Buena Center Redevelopment Plan.

S. OFFICE SPACE PROJECTIONS RELATED TO THE SPACE CAPACITY STUDY

In recent years there has been an average annual increase in the total inventory of office space of approximately 300,000 - 500,000 gross square feet. Projects under construction and announced could increase this level upward to 900,000 gross square feet annually in the short run (four years), depending upon the accomplishment of announced intentions.

The survey of recent projections of office demand and the application of several other survey techniques indicate longer term (10-15 year) projections of 400,000 - 800,000 gross square feet of space demand annually.

This range of projected demand could imply an increase of 6 to 12 million square feet of gross office space over the next 15 years in the Financial -Administrative District Space Capacity Study area, indicated as Areas A through E in the study just described. If the highest level of demand prevailed, the growth rate over the 15 year period would be three times that of the past 30 years and twice that of the most recent decade. The 12 million square foot increase in office space would be a 55 per cent increase over the present inventory of 22 million gross square feet, an inventory that has represented 60 years of construction.

Definite development proposals could account for 6.5 million of the 12 million projection, leaving 5.5 million gross square feet of office space to be accommodated. This amount could be accommodated in Area A alone at a floor area ratio of 16:1, or within Areas A and B at either an average floor area ratio of 10.3:1 or an average floor area ratio of 7.5:1, both based upon existing averages in Area A. In fact, the entire existing stock of space within Areas A through E could be reproduced in Areas A and B alone on just the susceptible sites at the present allowable floor area ratio of 16:1.

These comparisons of space capacity with projections for the next 15 years are subject to the following conditions that would tend to extend their application to an even longer run period. The first conditioning factor relates to the observed cycle of office space growth over the past decades. The cyclical pattern indicates that a high growth phase where levels of construction are far in excess of previous periods is followed by phases of absorption of new space and lower levels of construction. As the present phase is one of an extremely high level of construction, it could reasonably be expected that a phase of lesser construction will follow. Accordingly, the total demand assumed for the next 15 years may in fact be spread out over 20 or more years.

Secondly, the criteria used in determining susceptibility for development in the Space Capacity Study are based upon the present state of sites and improvements. In a longer run view of this stock, certain of the criteria may change and the aging process will create

a continual increase in sites which are susceptible. Of particular importance is the fact that by 1980, the greatest proportion of the older stock of office buildings will be 50-60 years old, including many structures of 10-15 stories that have been considered non-susceptible in the present Space Capacity Study. Approximately 14 million square feet of office space in the Space Capacity Study area is 10 stories or more (a total of 83 buildings), and about one-half of this space is in the 10-15 story range. Nine million square feet of the space in this tall building category (in 64 buildings) was built before World War II and a majority of this older space lies in the 10-15 story range. This 9 million square feet of older space in tall buildings and especially the large proportion in the 10-15 story range would become potential sites for new construction, especially when considered in light of the accelerated obsolescence that may be expected in older buildings when a major stock of newer space becomes an accomplished fact in the next decade.

Another conditioning factor has been the assumption in discussion of office space projections that all of the anticipated demand would be satisfied within the Financial-Administrative District and its periphery. Nearly one-third of the present stock of office space in the downtown area is located outside this area, and a review of the table in the Appendix showing buildings recently constructed or announced (Table 22) indicates that this dispersion of office space in the downtown area is continuing. The location of major structures in a wide downtown pattern raises questions of the extent and intensity of office development in all areas of downtown San Francisco, and it can readily be seen that these questions are related to the extent and intensity within the Financial-Administrative District.

The discussion above leads to several distinct conclusions about the relationship of space capacities to anticipated levels of development. Of first importance is the finding that office space capacities within the Financial-Administrative District Space Capacity Study area, when predicated upon reasonable and conservative estimates of site availability and allowable intensities, far exceed anticipated levels of development in the next several decades.

In addition, when this analysis is carried to longer run consideration, there are conditions in the age of structures on presently non-susceptible sites that would tend to continue this leeway in office capacity.

The capacities shown in the summary table above afford reasonable latitude for broad zoning policy decisions based upon the alternatives of greater intensity of development and greater extent of area in the Financial-Administrative District and its periphery.

Differing factors of accessibility, present intensity, compactness and character, economic feasibility, effect upon adjacent development, local circulation and pedestrian space, design flexibility and view considerations, light and air and soil conditions will be instrumental in evaluating alternative zoning policies in the next phases of the Downtown Zoning Study.

II. URBAN DESIGN ASPECTS

By WALTER F. BOGNER
DESIGN CONSULTANT

INTRODUCTION

This study input of the Design Consultant illustrates existing conditions, calls attention to imminent changes from new construction, aims to find a direction for growth and future development, and illustrates achievements in urban design in other cities of the United States and Europe. The material gives the background and sketches trends and opportunities for the improvement of architecture and urban design within downtown San Francisco.

For the projection of growth and change over many future years that must be dealt with in realistic zoning proposals, this design study will be expanded through future incorporation of: (1) data on traffic and parking conditions that are basic to the amenity of accessibility; (2) continued discussions with business leaders and knowledgeable citizens to gain an understanding of local aims and desires; (3) data on building space and land use compiled and analyzed in other portions of the Downtown Zoning Study.

The visual image of downtown points to its assets, problems, and opportunities. Conservation of existing features and stimulation of a development of new values can be accomplished if zoning is not merely restrictive with controls but also aids better design through incentives and bonuses.

DESIGN ELEMENTS AND NEEDS

Design and the Image of the City

Design exists for a purpose: in urban design it is the aim to achieve an appealing and well-functioning environment for urban life. The image of the city which results from this effort expresses how well the aims have been achieved.

Existing Image of Downtown San Francisco

The image of the city may be the result of a natural growth of buildings and open spaces on an existing topography and street pattern. Accidental beauty under this condition may result if a visual order is developed out of the intelligent exploitation of the amenities of building sites (for example, in the striving for sunlight and views). This natural growth is like the organic process followed by plants in shaping themselves according to the light and nourishment they derive from their environment. San Francisco grew beautiful, and naturally so out of its magnificent location at the Golden Gate and the use of hillsides and waterfront. However, rampant growth that has lost its economic support and tends toward blight is endangering beauty and amenities. Zoning must now function to protect against loss of the unusual qualities the city's image holds.

The image can also be shaped by man. In this way urban design creates values through the efforts and skills of architects and planners. Here, the image is the architectural expression of functional and esthetic demands of people living and working in the urban environment. San Francisco has buildings and squares that have been designed by architects who have won their place in history through their contributions to the architecture of the city and the Bay Region Style of American Art.

Bernard Maybeck with his Palace of Fine Arts foremost among them; Arthur Page Brown, the traditionalist, who created the Ferry Building; Willis Polk who rebuilt the city after the fire; Daniel Burnham--imported to the city for his national fame--who offered a plan that was accepted but never carried out; Arthur Brown, Jr., who designed the City Hall, War Memorial, and Opera House of the Civic Center; and others like Timothy Pflueger who introduced modern office buildings to the skyline during a great period of post-World War I expansion that ended with the Depression. These were followed by a number of firms contributing to a new image.

Image as Reflection of Economic and Social Conditions

Today's visual image of the urban environment whether achieved through natural growth or design reflects economic and social conditions along with the will of the citizens to improve or merely carry land and buildings. Functionally, the city is an organic entity; the various districts and neighborhoods are dependent on each other. Neighborhoods grow or deteriorate as a result of situations that favor life and productive activity in them; but all of San Francisco is dependent on the economic strenghth of the downtown district.

IDENTIFICATION OF DOWNTOWN DISTRICTS AND NEIGHBORHOODS

Downtown includes districts with buildings of commercial, residential, governmental, and diverse industrial uses. The study is limited to an arbitrary area with boundaries following Vallejo Street from the waterfront to Franklin Street, then turning southerly to the freeway and returning to the waterfront along Bryant Street.

The district names in this text rely on titles used on the maps of the San Francisco Department of City Planning. The identification of areas and places relies on the informal and popular designations recorded by the City Planning Department on its map of District Names of San Francisco.

The term "neighborhood" has been introduced to define areas that are tied together by related functions and are limited by the pedestrian movement within them. Some neighborhoods of San Francisco have focal points or symbolic features about which foot travel circulates. Union Square is an example. Frequently, a neighborhood centers about an axis along its principal street; for example, Chinatown with its Grant Avenue, the Financial District with Montgomery Street.

While some factual information is still being prepared, only observations and reactions can be recorded with the aim to approach a structure for downtown. So far the design study relies primarily on an analysis of extensive photographic material showing existing conditions and available plans and printed information. In order to relate this to the districts and zone boundaries, a drawing has been compiled which identifies the following neighborhoods in the downtown structure; the comments are offered for discussion.

Nob Hill

A neighborhood that is held together by the topography and that depends on its panoramic views for being the choicest hotel and residential location in the city. With tall buildings intruding on the views, additional protection through zoning appears necessary; the need for new measures to maintain a penetration of the outlook to distant points is indicated, and control of building bulk, form, and land coverage requires study and refinement.

The opportunity for the development of high rise towers in prescribed areas along the south slope of the hill should be kept open, but with proper spacing to assure the continuation of the enjoyment of the amenities offered by the hill to attract residents to downtown as an aid to business in the adjoining areas.

Financial District

A prestige neighborhood of office buildings and banks that has Montgomery Street as its axis. As frequently happens along such "main streets", location of properties of highest prestige has tended to spread or shift; some such movement in recent years has apparently occurred along California Street up Nob Hill. The direction high rise construction will take from there demands investigation. To the north it now reaches into Chinatown and with the Aloca Building it approaches an area of unique character at Jackson Square. Opportunities for expansion are confined in a northeasterly direction and unlimited in the south across Market Street.

High rise buildings, concentration of working population, increasing street congestion demand development of bonus incentives to create arcades, plazas, or open spaces for pedestrians, to assure the penetration of sunlight and air, and the movement of vehicles on the street level. Parking garages within new buildings* will require concern for the location of automobile entrances and exits to prevent traffic problems during rush hours.

Esthetically speaking, the tall buildings hold visual interest and with proper regard for the control of ground coverage and building bulk, there is no serious objection to their height. In these zoning measures the aim must prevail to prevent streets from becoming excessively crowded dark canyons, and buildings from forming solid barricades

*Bank of America with planned capacity for 500 cars.

behind which the panoramic views from Nob Hill disappear. Structures in the shape of long slabs following the direction of the contour lines of the hillsides are more objectionable than those placed perpendicular with them. There should be a limit to the length of high rise buildings in critical view areas, and even in places where they become esthetically harmful intrusions on well designed building groups as, for example, at the Civic Center.

Union Square Shopping and Hotel Area

In this neighborhood Union Square is definitely a center and symbolic feature in the image of San Francisco. Conservation of the uniform height and character of the Square in keeping with its small size suggests itself, while incentives for modernization and new construction demand consideration.

Downtown retail areas in all cities across the nation experience competition from business centers in suburbs and regional shopping centers. Department stores generally face a problem with changing shopping habits of the public.* The demand of the times is to create new attractions in the heart of the city to bring people downtown for business and recreation through new amenities and stimulations offered. Union Square neighborhood demands an imaginative development plan inspired by the successful examples of other cities.** Separated pedestrian circulation suggests itself, with lanes and passages through attractive areas that offer visitors stimulating experiences which some now find at Ghirardelli Square.

Parking is a major need. The fine old hotels in the Union Square area are handicapped by a poor automobile access and inadequate parking in comparison with newly built motor-hotels in other sections.

Jackson Square

A small commercial neighborhood that resulted from a most skillful rehabilitation of an old warehouse district. Conservation of beauty and amenities that have been achieved, and a design control for expansion of the area and alterations within it are necessary. At the present time an M-1 district separates Jackson Square from the Golden Gateway residential section; a revision in zoning suggests itself to provide the area of expansion and to include the necessary controls for development within it.

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*See Sternlieb: The Future of the Downtown Department Store, Joint Center for Urban Studies, Cambridge, Mass. 1962.

**See illustrations of architectural achievements: Charles Center, Baltimore; Midtown Plaza, Rochester; etc.

Chinatown

Chinatown is defined somewhat by a special height district shown on a City Planning Department map for the eastern slope of Nob Hill. Grant Avenue north of Pine is the heart of the neighborhood enjoyed by tourists; presently the financial district is approaching this area. Portsmouth Square is a center for the outdoor life of the crowded residential area.

A towering structure has been proposed and the Chinese community expressed other development objectives in a SPUR committee report dated May 1963 with these suggestions:

1. A symbolic gateway.
2. A Grant Avenue corridor as a pedestrian mall requiring relocation of vehicular traffic and parking.
3. A Portsmouth Square arcade as a pedestrian connection from Grant Avenue to the Portsmouth plaza underground garage.
4. The "Marco Polo Bridge"--a pedestrian overpass from Grant Avenue, Chinatown, to Grant Avenue, North Beach, between Columbus and Vallejo Streets.
5. A parking garage on Green Street near Stockton Street.

The proposed pedestrian mall and pathways are in the spirit of the solutions to crowded streets now being worked out in progressive cities. The practicality of the suggestion to close Grant Avenue to traffic would have to be determined by a traffic study.

The city might well concern itself with improvement within Chinatown not only to bring more tourists to the area but also to improve living conditions. There are important design features proposed which in the hands of unskilled designers might very easily become offensive intrusions on the image of the city. Rehabilitation that has been carried out so well at Jackson Square might well be undertaken in Chinatown by persons with sufficient artistic skill to give the area its oriental flavor without having it become cheap fakery.

Golden Gateway

This new residential neighborhood is becoming established. The commercial Golden Gateway project area with the completion of the Alcoa Building will tend to encourage new construction near the proposed park at the Ferry Building. Development plans for the Embarcadero can bring this waterfront to the new life it demands for enjoyment by the surrounding neighborhoods and the entire city.

Civic Center Area

The Civic Center Area comprises a series of neighborhoods of differing functions and character. The zoning boundaries and the designated uses for various pieces of the area demand clarification. The government and convention buildings comprise the neighborhood

identified as the Civic Center; to the south is an uptown commercial neighborhood developing around the Fox Plaza construction; to the north a changing neighborhood is subject to improvement along Van Ness Avenue. The C-M district that lies to the north of Turk Street adjoining the Civic Center appears incongruous in this territory. The future traffic on Van Ness Avenue as a result of the pending freeway location will give a clue to the development of the entire area in the immediate environment of the Civic Center.

The open space in front of the City Hall along its imposing approaches provides a splendid opportunity for the creation of an attractive park that will exert a stimulating benefit to the development of this section of the city which includes the Midtown Residential area. (There is sufficient experienced design talent in San Francisco and the nation to solve the problem.)

Midtown Residential - Tenderloin District

A large area that lacks features about which a homogeneous neighborhood could develop. The area shows deterioration apparently from a rampant boom in hotel building in the 1920's; within its population it now harbors some unstable transients. The location of this mid-way between the Civic Center and downtown shopping offers many conveniences. A fine improvement was carried out in Eichler's Midtown Towers. Buildings of this type should be encouraged and be permitted to go to the maximum height allowable for residential zoning to provide highly desirable apartments with the good views to be obtained in the area. Open space should be provided by offering bonuses for setbacks and garden developments in the middle of the blocks along specified streets.

Van Ness Avenue Area and Polk Gulch

This section of unusual topography along a principal approach to downtown offers promise for development of attractive motels and apartments on the hillsides combined with the retail shopping.

South of Market

This is a very large land area inadequately used, blighted, and ugly. The reasons are its inaccessibility from the good sections of San Francisco north of Market. The large land mass beckons improvement and demands a share in the life on the other side of Market Street tracks. Yerba Buena Redevelopment will be a help and provides an opportunity to create a project of great esthetic impact. In the Yerba Buena development an opportunity to bring new values to South of Market Street can be won or lost. In this area developers find the large blocks that are sought for the large scale developments which hold such great advantages.

Neighborhoods

The current phenomenon in larger cities is the natural formation of "islands" of pedestrian circulation within which neighborhood life takes place. As automobile use is becoming increasingly difficult in congested areas, shopping, business, and social contacts limit themselves to walking distance. The pedestrian circulation may extend within an area of an eighth to a quarter mile radius (five to ten minutes walk) and focus about a center or an axis as described for the Union Square neighborhood or the Financial District in the neighborhood of Montgomery Street.

These and others like Nob Hill, Chinatown, Jackson Square, the Civic Center, etc., take on a certain pattern on the map. The reason for the pattern is that topography, accessibility, street layout and other favorable features in the location provided the amenities about which the development of the neighborhood coalesced. The shape and character of the neighborhoods are discernible in the visual image of San Francisco.

A comparison of panoramic photographs taken years apart shows in the locations of additions to the skyline where growth has occurred and where the centers or axes around which neighborhoods have structured themselves are located.

The neighborhood concept is illustrated in two diagrams on the following page. Figure I shows how tolerable walking distances limit the size of a neighborhood, establish ideal garage locations, and locate the lines of pedestrian flow. Figure II shows a suggested application of the neighborhood concept the Union Square area.

Diagram of the Neighborhood Concept

An internal circulation between department stores, restaurants and shops through arcades and bridges is suggested by the symbol (.....) ....it extends the existing Blum-Macy connection.

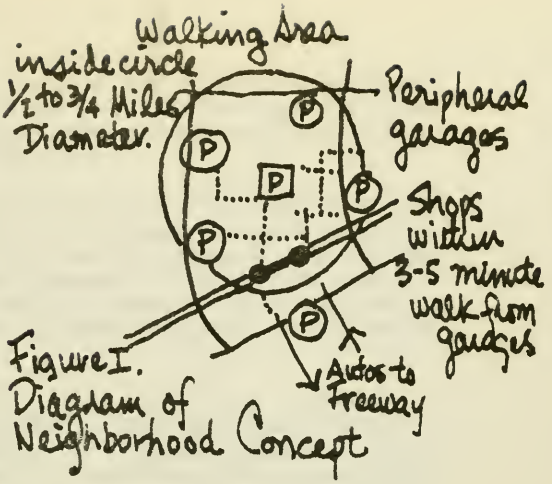

Figure I.
Diagram of
Neighborhood Concept

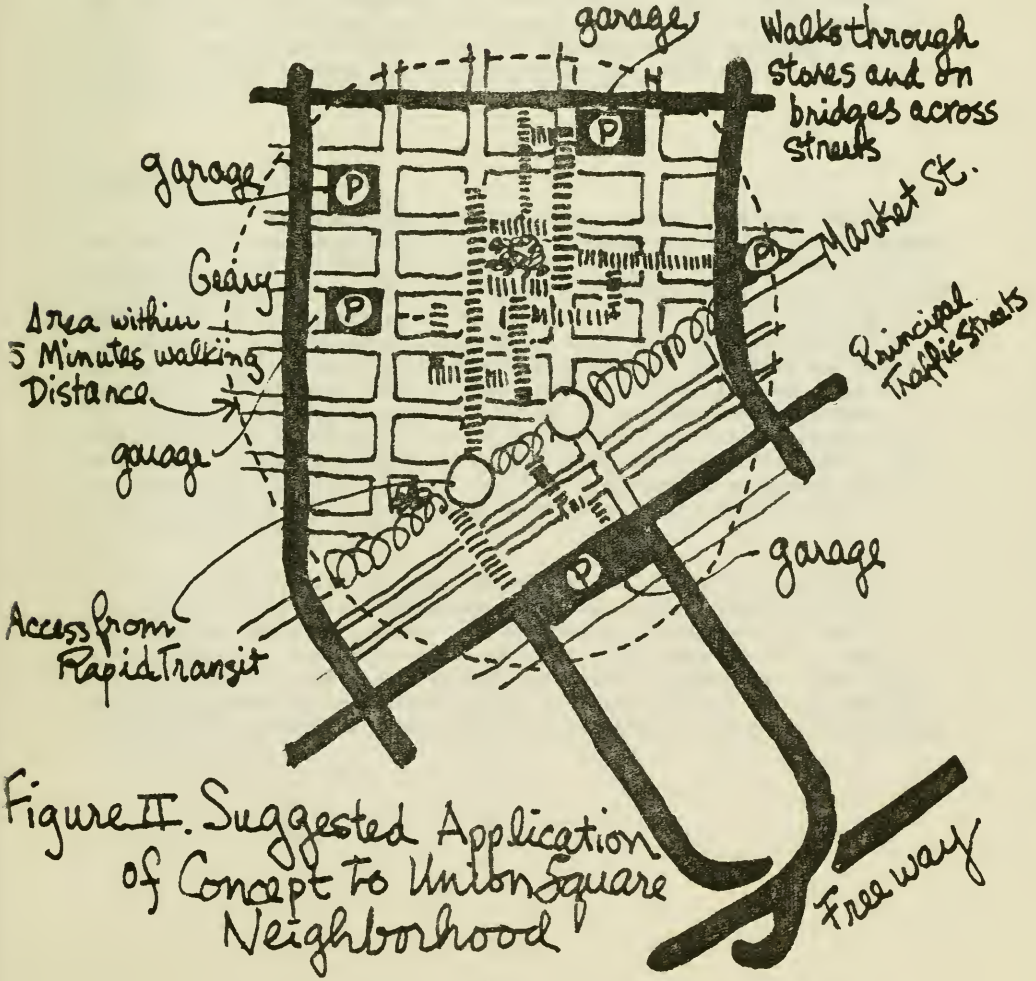

Figure II. Suggested Application of Concept to Union Square Neighborhood

The neighborhoods indicated are theoretical in their boundaries and extent. The location of their focal points and axes and the placement of garages will demand comparison with the data being developed in other portions of the Downtown Zoning Study.

Planning measures in a neighborhood allow for the creation of new amenities. Accessibility being one of the primary amenities points to the need of adequate parking facilities on the fringes or within neighborhoods. When data on parking requirements will become available for various sections of downtown, the existing garage locations and their capacities can be evaluated in terms of their adequacies for the neighborhood.

Growth patterns to be helpful to future projections can also be discerned from the neighborhood structure. There are directions of movement open for the growth and expansion of neighborhoods while others are blocked by adjoining developments. A critical point occurs at the meeting of the Nob Hill residential, the Montgomery Street financial, and the Union Square shopping and retail area. This juncture occurs about St. Mary's Square, and the Financial District cuts across Grant Avenue of Chinatown to include the Metropolitan Life Building on Stockton and Pine Streets. The consequences to Chinatown's unusual shopping street should be considered in planning measures.

Emerging Districts

The term "emerging districts" has been chosen as a name for those sections of downtown in which cohesive neighborhoods have as yet failed to appear. Some sections of downtown--as typical in most cities--have suffered from a decline in their vitality. Residential areas with older houses and few amenities have lost some of their better population to the suburbs. Industrial and commercial districts have experienced a decline in business as a consequence of obsolete facilities and poor locations. Functional uses of land in these sections became mixtures: for example, commercial with residential in the Midtown-Tenderloin District; or light industrial with commercial, the former residential area South of Market Street. A neighborhood structure for these areas may emerge in the long run provided some stimulation or control measures lead to features in the areas that attract a lively development of related facilities.

South of Market, the Yerba Buena Project offers the opportunity for the emergence of a neighborhood that can spread its beneficial influence to the entire area. In the Midtown Residential no feature in the nature of a park or green strip or other amenity has so far appeared around which higher valued properties could grow. Hopefully, progressive developments like Eichler's Central Towers may ultimately stimulate the growth of higher grade residential properties within their vicinity.

The Spine in the Downtown Structure

Market Street is the backbone to downtown San Francisco. The street was a feeder to the life of all of downtown before the ferries stopped running; it has now become a moat that cuts downtown apart. A better future is promised with the beginning of rapid transit service provided the integrated planning activities work out solutions to complex issues.

Vehicular circulation across Market Street is now difficult and direct traffic cut-throughs are rare. The street separates the forward looking business section to the north from a poor industrial area that has fallen behind in the south.

Market Street has been studied, discussed, and redesigned in more reports and proposals than any other area of the city. Architects, landscape architects, and planners have appeared with diverse proposals for the beautification and revitalization of this unique street. They range from the creation of a grand boulevard in the spirit of Paris, the development of a pedestrian shopping mall in the current fashion for the revival of American main streets, or the clearing of land for a string of plazas conceived as beautified approaches to a new downtown for future rapid transit riders.

Market Street as it exists is a unique phenomenon that defies architectural treatment in imitation of any existing pattern. Under the inequality of conditions to the north and south of the street, it cannot support buildings of uniform height and frontage as conceived by Haussmann for the Champ-Elysees, nor can it exist as the landscaped pedestrian island contrived for the revival of American main streets in places like Eugene, Oregon, or other small cities.

The zoning study for downtown can aim to devise measures for land use that will tend to ameliorate the contrasting differences between the two sides of the street. For the planners, the problems are extremely complex and for the architect, the complications of the triangular building blocks and the danger of gaps arising from the removal of obsolete buildings present difficult esthetic problems.

Improvement in beauty and amenities will depend on the opportunities created for a healthy natural growth for which traffic, accessibility, and profitable land use to the north as well as the south of the street are essential.

PROBLEMS OF DOWNTOWN

The automobile is the major problem of downtown; the difficulties of driving and parking in the central area are at the root of the downtown economic problem. Freeways that carry traffic in an uninterrupted flow to and around the central area offer relief--but San Francisco's northern freeway loop is still incomplete. A parking survey that determines downtown parking needs is still in preparation.

Another measure of improvement to traffic is the segregation of pedestrian circulation to minimize delays and increase safety at street crossings. This has been proposed in the 1963 Downtown General Plan.

So far too little has actually been done for pedestrians in the United States except for some attempts to convert main streets into pedestrian shopping malls or to combine buildings around pedestrian plazas. In some New Towns of Great Britain*, Stockholm and other cities on the European continent, a complete separation of pedestrian ways from existing streets is being carried out whenever possible. The United States will ultimately follow these examples. Pedestrian ways already have established themselves by default in places where the streets were so inadequate for automobile traffic as to force their surrender to the walking public. The Wall Street area in Lower Manhattan has examples of this.

Obsolete structures are another problem of downtown areas. In many American cities, the quantities of parking lots that have destroyed the continuity of building frontages in downtown areas are evidence of the fact that too many buildings are unable to support themselves with the quality and kind of space they offer in areas of high land value. Boston, one of the oldest cities along with Philadelphia and several others, offers an example of downtown deterioration consequent to antiquated building facilities. The cure in Boston has been a drastic attempt at urban renewal with the demolition of a major portion of the old downtown area. This wholesale destruction of properties and established uses involves risks and demands political daring and autocratic leadership to be carried out. Fortunately, San Francisco has not reached that state of obsolescence except for the downtown industrial area South of Market Street.

American cities also have problems with smoke, smog, division by railroad tracks, and housing ghettos occupied by minority groups. Again in these respects, San Francisco is fairly fortunate. Though wind and fog are at times bothersome, their cooling effect in summer can be appreciated; but with the desire to have tall buildings along the existing streets, there is no way of reducing wind in the downtown area.

The rebuilding of a central area of Philadelphia after the removal of railroad tracks on a "Chinese Wall" has given an opportunity for the beautification of the heart of that city. Philadelphia's Penn Center, Boston's Government Center, Baltimore's Charles Center are evidence of the tremendous efforts spreading across the nation that aim for the removal of ugliness and the creation of beautiful American cities that might fittingly represent the most affluent country in the world. San Francisco has not started on a drastic reconstruction and is fortunate enough not to need it to the extent it is essential in older cities. However, with the pending rebirth of Market Street after rapid transit will have fed new life into it, San Francisco has a marvelous opportunity to begin to improve urban design in its downtown area. The visual studies for Downtown San Francisco by Mario Ciampi,

*See Cumbernauld, Scotland.

Consultant, have many inspiring suggestions for the improvement of the visual quality of this spinal road of the city. While many of the precise proposals will demand revision to integrate the complicated engineering, economic, and political considerations, they nevertheless have presented imaginative visual concepts to inspire public interest.

The existing freeway has failed to receive any architectural thought toward its execution. It could have been a road from which the unusual scenic beauty of the city and the waterfront could have been enjoyed. Instead, the visual termination of Market Street at the Ferry Building has been lost; and at the western end of downtown, the Civic Center has been chopped off by the architecturally insensitive work of highway engineers. The pending continuation of the freeway still has a chance to receive more sympathetic treatment in the interest of maintaining and developing the esthetic qualities of the city.

The creation of open space for the enjoyment of the public and the stabilization of property values is receiving considerable attention in far-sighted cities. New York found that at Rockefeller Center a mall and a small plaza, which are greatly enjoyed by the public, have helped to make the building group an economic success and a tremendous tourist attraction. This type of improvement will be emulated and be carried out more often in other cities particularly if it also has the functional advantage of becoming a link between buildings of related uses; i.e., for a combination of offices, stores, garages, exhibition space, broadcasting studio, restaurants, theaters, banks, etc.

The designs for the Civic Center in Lower Manhattan and for the Trade Center of New York show higher buildings than formerly possible; but they also indicate larger open spaces than would have been deemed possible under the exorbitant land values that prevail in that section of the city.

San Francisco has charming, small-scale squares covering public garages in its downtown area, but unfortunately there are not enough of them to offer more sections of downtown these amenities. The landscape development at the Ferry Building Park will be helpful to beautify the city and hopefully planting along Market Street will be carried out to achieve a continuous green strip leading from Ferry Park to the Civic Center. In the forgotten sections of downtown an avenue of trees, a planted square over a garage would greatly help the sprawling old residential areas to achieve a new appeal and higher value.

OPPORTUNITIES FOR ARCHITECTURAL IMPROVEMENT

The enhancement of downtown areas can be achieved through the artistic skill and planning genius of creative architects. While this is not an age that has contributed enough beauty in proportion to the boom volume of building construction, it nevertheless offers

examples of new achievements in building design that point to many opportunities that may well be taken in the improvement of American cities. The pioneering example of a multiple use property development at Rockefeller Center in New York has found wide following and is carried to new levels of achievement and to grand scale developments. An outstanding example which may see realization is the proposal for the Civic Center of Turin, Italy, for which a competition was held in 1963.* The combination of facilities attempted in the competitors' designs offers many suggestions for developments south of Market Street. The Turin proposal is full of suggestions in regard to the integration of garages, pedestrian platforms, pedestrian walkways, and the placement of tower structures above landscaped pedestrian platforms.

The new town of Cumbernauld, in process of development near Glasgow, Scotland, anticipates the construction of a single structure for a vehicular system covered by spaces for a variety of civic uses of the commercial, civic, religious, and recreational types.**

The Japanese have attempted to solve their staggering congestion in Tokyo with brilliant and at times visionary concepts for the utilization of waterfronts and housing within bay areas.***

Washington, D. C., proposes to beautify Pennsylvania Avenue and make it a fitting representational boulevard between the White House and the Capitol. If carried out, it will exert a demand for similar beautifications in other American Cities.**** Philadelphia has not only carried out grandiose plans for its Penn Center, though in a somewhat modified form; it has now also succeeded in extending its downtown improvements to the riverfront and the areas of Independence Hall and the Museum of Fine Arts. A cohesive urban design is being carried out systematically step by step.

Chicago offers spectacular buildings prominent for gigantic proportions. Marina City is attracting considerable interest as a multiple use building complex with circular residential towers.

The considerable progress in architecture and building construction will demand consideration in a zoning study. Substantial breakthroughs have been made in construction technique, in mechanical installations, in new forms of esthetic design, and in solutions to complex planning problems. Architects have concerned themselves with the interrelation of buildings and the urban design aspects of the spaces between structures. The large projects now being undertaken show the advantage that groups of buildings can be designed as harmonious and impressive entities with more efficient interrelated services. In detail the following points currently influence the progress of architecture:

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*See Casa Bella, No. 278, Aug. 1963.

**See Architectural Design, London, May 1963.

***See Architectural Design, London, Oct. 1964.

****See Architectural Forum, July 1964

1. The attitude toward daylight and windows has changed since fluorescent lighting and air-conditioning eliminated the necessity for holding the depth of offices to 30 feet from the window wall. Buildings got fatter and bigger when large organizations demanded more extensive floor space for large personnel. While the attitude toward windows may have changed from the point of view of providing adequate light for seeing, the demand for large glass areas to bring in views has increased. Evidence of this exists all over San Francisco in the new towers of Nob Hill and Russian Hill.

2. The combination of diverse functional uses within buildings, again Rockefeller Center as an early prototype, plays a large role in current architectural planning thought.

3. The concept identified as platform planning is currently practiced; it places a group of buildings for offices or apartments over a platform covering parking, stores, banks, meeting rooms, and so forth. San Francisco's Golden Gateway followed this principle.

4. Hotels and most buildings are planned with an awareness for the high cost of labor and the difficulties of obtaining household helpers. This leads to obsolescence of the more sumptuously planned older hotels and apartments. Garages are deemed essential within apartments as much so as in single residences.

5. A decided trend toward greater building height has set in; it has been found more profitable to add stories at the top where higher rents are gained than to have apartments in the dark street areas. This results in setbacks, open courts, buildings on stilts, and arcades for which zoning bonuses may have been given.

6. The building forms are getting simpler, fewer ziggurats and elaborate towers. The floor areas are more nearly rectangular in shape for the purpose of maximum flexibility to the installation of partitions for varied tenant demands (this trend will bring problems to odd shaped buildings and structures along Market Street properties).

7. Construction is currently shifting to concrete from steel and metal curtain walls. Many advances in structural design offer greater spans between columns. Buildings up to 100 stories high are being erected (John Hancock in Chicago and Trade Center project in New York). The advantages of continuous span design, maximum stress design, pre- and post-stressing, prefabricated units, higher allowable material stresses, thin shell construction, and other new developments greatly extend the architect's opportunities for the achievement of more efficient and profitable floor space.

8. Mechanical installations are vastly improved not only in heating, lighting, and air-conditioning, but also in elevator and escalator service that makes taller buildings and a more rapid communication between floors for large numbers of people possible.

All the aforementioned factors must be taken into account in the consideration of zoning for the buildings of the future and the evaluation of existing space and building uses in San Francisco.

ACHIEVEMENT OF DOWNTOWN IMPROVEMENTS

San Francisco has already demonstrated a forward looking spirit in two of its newly contemplated projects. Golden Gateway offers a superior planning concept in the use of its platform for the apartment and townhouse towers; the Bank of America in building a 52 story tower is erecting the highest structure on the West Coast for its banking facilities, with 500 cars for employees under an attractive plaza.

The city is sharing with the Bay Region in the most advanced concepts for rapid transit. This fully controlled public carrier should in its harnessing of the most advanced techniques in engineering serve as inspiration to the use of the advanced concepts in architecture and planning that may contribute to the expansion of business and improving of the conditions of life and work in the downtown area. Zoning by itself can only serve as either a regulatory measure to control undesirable property development or as a stimulant to the spread of property development through the creation of open space along the street frontages and a wider distribution of properties of high value.

A national effort is being made to assist cities with urban problems through the establishment of a department of housing and urban affairs and nationwide campaigns to beautify cities and overcome ugliness and blight.

Rehabilitation is now recognized as an essential device for the utilization of the vast investment in buildings that have suffered from lack of modernization and improvements. San Francisco has demonstrated unusual artistic achievement in the rehabilitation of old warehouses in Jackson Square and the use of the Ghirardelli chocolate factory for a most successful tourist attraction created by an imaginative assembly of stores, restaurants, garages, and planted open spaces.

Historic neighborhood groups and various business associations will no doubt take it upon themselves to follow this stimulation and systematically go about preservation of historic areas and architectural features and the control of billboards, signs, store fronts, and street furniture in prestige business locations.

ZONING AS FACTOR IN IMPROVING DOWNTOWN

The Design Consultant's study concerns itself with the esthetic qualities and amenities of the downtown area on which the vitality of this part of San Francisco depends. There has not been a specific plan offered in the nature of a map or pictorial sketches as this study is stillof a general nature and hopefully will be followed up by others with drawings and planning recommendations. However, an effort has been made to avoid that degree of dealing with zoning as an abstraction which would not have any relation to actual physical, economic, or social conditions in the city. Hence, it is hoped it will be helpful in the formulation of policies and bring out points that will be followed up by the Department of City Planning and the General and Resident Consultants.

The review of the material that represents the visual image of downtown in photographs and allows for the discernment of its amenities on drawings, reports, and statements brings to light several points that may well stand improvement or demand concern in the zoning which is to grow out of the downtown study. The philosophy behind the new zoning for New York City suggests many possible improvements for the zoning of San Francisco. The effort there is to prevent over-building, to achieve simpler buildings that are more efficient to erect, to provide more open space, to offer greater latitude in design, to extend the range within which the residential, business, and industrial uses can be brought into relationship with each other and, in general, to reduce density of population below a limit the space and facilities of an area can support.

The principle of approaching zoning through bulk controls which curtail the size of the building for each specific lot has already been in force in San Francisco to the extent of requiring floor area ratios. There are refinements possible which have already appeared in the New York law in the nature of open space ratios; that is, the relationship between the number of square feet in the building and the open space on the lot. From a design point of view, this provision provides an opportunity to create open space on the street level in the form of terraces, plazas, arcades, and other uncovered ground area. Provision of open space can be tied to bonuses resulting in additional building height. Further, the open space ratio tends to spread land use and capital investment over a wider area.

San Francisco presents conditions to zoning that go beyond anything enacted in other cities. The beauty of the hills and the most exceptional views from the promontories demand protection. For the control of views, height limits have been enacted in certain areas but usually after a particular structure has brought to light the harm that can be caused in the nature of visual obstruction, loss of sunlight, blemish in the panorama of the city.

Photographs have been taken in this design study to show the existing buildings and prominent building construction which is being carried out; they also indicate by overlays the structures to be expected on the skyline within the near future. From these it can be seen that the increasing density of buildings in the Financial District is leading to a more solid wall that obscures an increasing portion of the Bay view from the top of Nob Hill. In consideration of this, refinements will be needed in the boundaries of the height limits to the east and north of Nob Hill or the establishment of "visual corridors" that safeguard the view of significant features in the panorama.

Consideration of the neighborhood structure also points to conflicting conditions between Chinatown and the Financial District in the area of Grant Avenue and California Street. It shows the problem of overlapping land uses in the area. The prevention of deterioration in the appeal of Chinatown may rest in specific design studies leading to development plans for this area. Again, these will grow out of the concept of solutions to traffic, to pedestrian circulation and tourist movement, and to the economic demands of the Financial District and the social and business needs of Chinatown. A similar approach to

detailed problem areas will have to be followed in various other areas that may come to light as the study moves into greater concern for detail.

Creative architectural solutions demand a certain freedom of movement for the designer. Legal minds and statistical geniuses cannot solve them. Suffice it to say that within zoning there must be sufficient freedom of movement for the architect and the developer to find the best answer to needs that architectural knowledge and property financing and management can contribute. A certain adjustment and variation to overcome hardships must be built into a zoning law.

Variations have already been in effect during the years zoning has been a part of San Francisco's laws. Further refinements in the floor area ratio and minor changes in the district boundaries and height limit areas are indicated to eliminate some inconsistencies. Chinatown is a case in itself; it can only be solved on the basis of a complete understanding of local physical, economic, and political conditions.

The floor area ratio of sixteen to one which is now in force appears adequate. Of the 180 buildings listed in a study of the City Planning Department of Tall Buildings in Downtown dated May 1965, only three exceeded the sixteen to one ratio. Indeed the benefits in the existing laws that accrue from corner locations, through lots, and air rights make buildings of any desirable or workable height possible. The Bank of America will build its 52 story building within the existing limits. New York's ratio is fifteen to one; Los Angeles, thirteen to one; Boston, ten to one; and Philadelphia, twelve to one. The needed refinement in the floor area ratios also demands concern for the fact that the steep hillsides present a unique height control problem not encountered elsewhere.

Corner location bonuses should be studied in relation to the concentration of pedestrian and vehicular traffic generated by them at the four corners of an intersection. Garages within buildings need encouragement in some areas, but consideration should be given to the location of garage doors in relation to street traffic, particularly in the most congested areas. New York in a way has an easier time to solve its problems in Lower Manhattan because it has progressed to the point where private cars are nearly impossible and adequate subway facilities to move the population are available. San Francisco's future Bank of America building will be a considerable distance from the BARTD stations on Market Street.

A special effort is needed to increase the vitality of the retail shopping and entertainment area in downtown and toward this, the return to downtown of residents from the suburbs will greatly help. The opportunities for this in San Francisco's downtown are unique in that the whole of Nob Hill along its southern slopes offers opportunity for the construction of apartment towers with exceptional views. Living within walking distance of one's work can be given added appeal by some concern for beauty.

BUILDING BULK STUDIES

Studies of building bulk have been prepared to show permissible heights and possible developments on building sites. They compare what could be built on street blocks of San Francisco with existing large scale developments elsewhere. These studies present the message that the shape of buildings to be erected along the critical slopes of Nob Hill must be so regulated as to prevent a solid barrier of structures from completely obliterating the Bay and Golden Gate views. In arriving at building form regulations, the building owners' efforts in achieving a structure that is efficient to build and operate should be supported. This will demand a concern for standards for the efficient planning of office, commercial, and residential structures.

Union Square, as a small oasis of great importance to downtown, needs the protection of height limit, billboard controls, and any other practical devices that assure it of esthetic qualities. Fortunately there is a proposed height control for its fringes.

LOCAL DEMANDS AND COMMENTS

Some expressions of interest in and demands for the downtown zoning study have been available in printed reports; others have been available to the Design Consultant through memoranda of interviews and research. The SPUR reports on Downtown Zoning of November 1963 and "An Analysis of the Proposed Downtown Plan" of a later date have provided clues to an understanding of the attitudes and needs of the business community behind this organization. These papers present logical points and few issues raised questions or doubts. Understandably, throughout the papers traffic and parking provisions are receiving critical comment in nearly half the points discussed.

Definitely the problems of the automobile are the problems of downtown in every city of any size. To deal with them in San Francisco demands traffic and parking studies which not only will provide statistics on existing conditions but will also enter into projected needs for parking and vehicular flow. The objectives to a traffic and parking solution are not alone to keep the cars moving but to recognize the people's wish to enjoy the use and availability of their cars in downtown; shopping centers elsewhere meet this desire. This means that the amenities of accessibility to the buildings by persons using automobiles should be improved, that parking be made more convenient, and that in spite of traffic, pedestrians be able to move as freely and safely as possible. These objectives can only be approached from a traffic plan that will most likely involve widenings or cut-throughs of some streets and additional downtown parking garages. The solutions can only be obtained on the basis of drawings providing solutions at critical points that are in the nature of a traffic plan. Off-street loading will have to be recognized in the zoning requirements.

Economics are without question the governing factors to zoning. In their interpretation, values cannot be always established on the simple dollar and cents basis, as esthetic factors, the views, and many other amenities contribute intangible human values that cannot be measured with mathematical precision.

There is no serious objection to high buildings if they are in the right place, in proper grouping, and the right shape. The density of development to be aimed for is certainly an item that demands closer study. While a high concentration of activity and population is helpful to business in some areas, it may reach a point when it is in contradiction with the accessibility demanded.

The Downtown General Plan* has as primary merit a collection of beautifully presented inspirational photographs of models and drawings for Market Street and adjacent areas. At that time specific proposals backed by cost estimates, which SPUR suggested should have been presented in the nature of a development plan, were not possible. Likewise, much of the data becoming available in this zoning study will have to be analyzed and projections from it will have to be carried out before any sound recommendations can be made. Whatever is to be done will demand the recognition of the problems of downtown in their totality and in their relation to all of San Francisco and the Bay Region. Downtown has in addition to the all important Financial District, the Union Square area, and Nob Hill that are so important to the SPUR interests, extensive tracts of land that are begging improvement and that are offering space for the growth of neighborhoods of intensive land use and the spread of higher property values to other sections.

GROWTH PATTERNS

The eras during which San Francisco enjoyed growth can be put into three periods of about two decades each: the period of reconstruction leading up to the First World War and ending approximately 1920; the period of interwar growth extending between 1920 and 1940; the contemporary era of growth starting with the Second World War. This zoning study is to provide for the growth up to 1980.

A map showing the construction dates of tall buildings indicated in accordance with these three periods shows that during the first period, prominent structures grew along Market Street following a southwesterly direction from the Ferry Building. Up to the First World War the intensive development of office buildings appears to have been centered more about Sansome Street and seems to have spread to the north from Market Street up to about California Street. The department stores, the prominent early hotels like the St. Francis and the Palace built during that era show that commercial property development began on the flat section of San Francisco and was strongly tied to Market Street.

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*Department of City Planning and Mario J. Ciampi, Consultant, 1963.

During the interwar years property development moved away from Market Street, progressed outward on Montgomery and Sansome Streets, and spread from Union Square with a boom in hotel building in that area now roughly referred to as Tenderloin District or Midtown Residential. Superior hotels and apartment buildings rose on Nob Hill.

The contemporary growth pattern is not as clearly organized but does suggest that Nob Hill has become a magnet that is pulling property development in its direction. The new buildings (Hartford Building and International Building) that are now such pronounced features on the skyline will become parts of the most prominent cluster of office towers in the city with the completion of the Bank of America; this group will in size and height out-distance the Wells Fargo Building with its surrounding structures on Market Street. For the present era, this suggests a movement of prestige land values away from Market Street; whether it will reverse itself again in the next decade with the completion of BARTD remains to be seen. The development of the area South of Market will play its role in the movement of land values and the return of significance for that street. The spurt of new construction at Fox Plaza indicates the beginnings of a new life for Market Street in the Civic Center area.

For various reasons the movement of property values in San Francisco has not followed the pattern which is typical for cities on flat land. In Manhattan the movement has been outward from the Bowery and in the 20 year intervals equivalent to San Francisco, it has progressed over a substantial territory and now has reached Central Park. It is splitting to spread westward and eastward in its consistent movement away from the older centers. With growth, sections like Union Square have been left behind in the rush to benefit from the population stream pouring out of Grand Central and Pennsylvania Stations.

San Francisco's growth and movement in downtown property development is unique because of changes in the role of Market Street with the abandoning of ferry service and the future rapid transit. The confinement of downtown within surrounding hills and the Bay tends to arrest a one directional growth and allows for sections that have fallen behind to catch up in development.

The conditions described in these comments are mere observations based on the study of maps recording the ages of buildings and photographs showing the character of the built-up areas. The comments are presented for the purpose of evaluation on the basis of data to be brought out in the economic analysis conducted by others. The comments have been made to stimulate discussion and study of a direction for the improvement in downtown values as this may become aided through various zoning and planning measures.

III. COMPENDIUM OF GOALS AND ISSUES FOR DOWNTOWN SAN FRANCISCO

This section was prepared at the beginning of the study period as an effort to orient the Downtown Zoning Study toward the pertinent goals and issues that represent citizen and official concern with the future of downtown San Francisco. These goals and issues were elicited through review of the 1963 Downtown General Plan and other relevant reports, interviews and discussions with interest groups and official agencies, and a preliminary review of accumulated data. It can readily be recognized that many of the downtown goals and issues stated here raise broad questions of downtown policy in both public and private sectors and that many are competing or conflicting.

This section is written to a wider scope than just zoning and zoning controls, and the resolution of all of these is more than the purpose of the Downtown Zoning Study. It is clearly recognized that not all actions or aims called for in a comprehensive program for promoting an optimum of downtown conditions and development, as marshalled in these lists, can be implemented or furthered by zoning, although all of them are interrelated with zoning in various degrees and must, therefore, be considered in the study.

A. GENERAL FORMULATION OF GOALS AND ISSUES FOR DOWNTOWN

A starting point for this list draws upon the six categories of general goals stated by the Department of City Planning in a draft memorandum of September 11, 1964. These were:

1. Efficiency and strength of the downtown area;
2. Adequate space for all functions in this area;
3. Good circulation of vehicles, persons and materials;
4. Aesthetic and other amenities;
5. Encouragement of construction, reconstruction and remodeling;
6. Establishment of appropriate zoning controls.

These goals would operate within implicit city-wide

objectives that would assume the following matching set of statements:

1. The health and vitality of the downtown area would reflect upon the economic health of the entire city, as downtown represents the most important economic element;

2. Adequate space in downtown would be complemented by space for other functions throughout other parts of the city, and the distribution of these functions should afford their most efficient interaction. This objective raises the issue of what downtown is, and how it can be defined physically, economically or functionally. A definition of downtown San Francisco for purposes of this Zoning Study will be assumed as the composite of functional areas discussed in this paper that comprise the Study Area. This definition is put forth as a hypothesis to be tested in the course of the study. The Master Plan has as an objective "...the organization of the two principal parts of the city - the working areas and the community areas - so that each may be clearly distinguished from but complementary to the other..."

3. The circulation goal for the downtown is part of a Master Plan city-wide goal to coordinate "...land use with circulation routes and facilities required for the efficient movement of people and goods within the city, and to and from the city."

4. The amenities objectives were tied with the Master Plan goal of "...enhancement of the economic, social, cultural and aesthetic values that establish the desirable quality and unique character of the city."

5. Encouragement of new construction investment is an objective implicit in the total Master Plan and in the city-wide objective for "...coordination of the growth and development of the city with the growth and development of adjoining cities and counties and of the San Francisco Bay Region."

6. Establishment of appropriate zoning controls is again implicitly contained in the Master Plan objectives for "...coordination of the varied patterns of land use with public and semi-public service facilities... circulation routes and facilities." Objectives of the City Planning Code (zoning ordinance) itself are outlined in Section 101 of the Code. This

section reads as follows:

SEC. 101. Purposes. This City Planning Code is adopted to promote and protect the public health, safety, peace, morals, comfort, convenience and general welfare, and for the following more particularly specified purposes:

(a) To guide, control and regulate future growth and development in accordance with the Master Plan of the City and County of San Francisco;

(b) To protect the character and the stability of residential, commercial and industrial areas within the City, and to promote the orderly and beneficial development of such areas;

(c) To provide adequate light, air, privacy and convenience of access to property, and to secure safety from fire and other dangers;

(d) To prevent overcrowding the land and undue congestion of population;

(e) To regulate the location of buildings and the use of buildings and land adjacent to streets and thoroughfares, in such manner as to obviate the danger to public safety caused by undue interference with existing or prospective traffic movements on such streets and thoroughfares.

The six categories of goals can be detailed as follows:

1. EFFICIENCY AND STRENGTH OF THE DOWNTOWN AREA

This major goal calls for promoting the realization of the potentials of the downtown area, both economic and functional. More specifically to:

a. Encourage new firms to locate in the downtown, bringing new employment opportunities;

b. Encourage higher income employment in the downtown;

c. Increase the tax base through the attraction of new investment and activity;

d. Encourage the retention of industry within the city;

e. Contribute to the diversity of the industrial base by affording varied combinations of locational access to markets, supplies and labor and varying intensities and prices of land;

f. Preserve the headquarters functions of downtown and encourage the growth of headquarters firms;

g. Preserve and enhance the location factors that attract headquarters and management industries and that have provided an advantage for downtown San Francisco;

h. Minimize public costs for utilities and public facilities;

i. Afford the opportunity for exploitation of new technologies in industry, construction, transportation and automation;

j. Increase and safeguard the tourist attraction of the downtown area;

k. Strengthen the multi-functional use of the downtown area and accentuate the interaction of the various functions within downtown;

l. Strengthen the retail business district shopping goods role in department stores as well as specialty shops;

m. Improve the commercial and industrial potential by providing for growth and rebuilding where appropriate through urban renewal;

n. Eliminate blighting influences and raise the quality of residential areas in the downtown;

o. Provide for an appropriate broad range of residential as well as commercial and industrial functions in the downtown area;

p. Provide residential facilities in a variety and choice suitable to attract differing economic, social and ethnic groups to the downtown area.

2. ADEQUATE SPACE FOR ALL FUNCTIONS IN THE DOWNTOWN AREA

Adequate space should be provided for all the downtown functions in present and future periods. This space should be in the proper location and adequate in terms of ground and building floor area. Some of the more specific aims implied by this goal are:

a. Encourage compactness in the downtown area consistent with the provision of adequate space;

b. Provide for each of the downtown functions in the proper portion of the downtown area and afford the best relationship of one function to another;

c. Provide adequate space for differing types of firms and differing land and space use relationships to allow for tenant-owners, small space users, large space users, prestige users, volume space users, and short and long term users.

d. Allow for an increase in residential population;

e. Allow for residential developments of differing densities;

f. Allow for space in such a configuration that would harmonize with natural features of the topography;

g. Allow for space in such a way as to protect against adverse natural conditions such as wind;

h. Afford space for the expansion of cultural activities;

i. Provide for a mixing of related and compatible activities to allow for multiple use of facilities;

j. Allow space for the provision of adequate community facilities to serve the resident and working populations;

k. Allow for a scale of development that would provide pedestrian linkage from one major function activity to another;

l. Afford choice and variety in housing types and in types of commercial and industrial structures;

m. Integrate land use and transportation planning to afford a balance in space use between streets, parking, and land uses.

3. GOOD CIRCULATION OF VEHICLES, PERSONS AND MATERIALS

Within the framework of overall transportation policy for the city and region, the downtown circulation system should provide for the most efficient movement of persons and goods in their various trip purposes. Some of the more detailed objectives within this category are:

a. Coordinate accessibility with functions and with the relation between functions;

b. Coordinate pedestrian, vehicle and material circulation by mode and trip purpose;

c. Provide a balanced system affording all modes of movement according to their most efficient usage;

d. Locate transportation terminals, both transit and automobile, where they will best serve the system of downtown land uses;

e. Provide an integrated city transportation system to and through the downtown area, with cross-town traffic by-passes and radial traffic to the downtown;

f. Link the downtown circulation to the regional freeway and bridge network;

g. Link the transportation system downtown with the airport and other major transportation terminals throughout the Bay Area;

h. Provide parking belts coordinated with the major circulation to the downtown to afford terminals for auto traffic;

i. Provide, in addition to parking belts, easy access from regional transportation networks to internal parking terminals located within the various functional areas where appropriate;

j. Provide for the best mix of modes in the journey-to-work trip to allow walk-to-work trips, local street transit for short ride-to-work trips, regional transit for commuting ride-to-work and parking facilities in designated belts for drive-to-work trips;

k. Provide for ease of pedestrian access and circulation between functional areas with continual pedestrian circulation across Market Street and through the large blocks south of Market Street;

l. Provide for the most expeditious street traffic flow with minimum conflict with pedestrians;

m. Coordinate subsurface traffic generating areas with surface areas and structures to allow for the free movement of persons in three dimensions;

n. Afford the efficient movement of materials during the 24-hour period to the various functional areas;

o. Develop transportation facilities to meet projected local, citywide and regional needs;

p. Develop an adequate freeway and bridge crossing system to meet regional and citywide needs.

4. AESTHETIC AND OTHER AMENITIES IN THE DOWNTOWN AREA

The amenities in the downtown area are more than a question of beauty. They provide for pleasantness of the whole environment, and the convenience and economic efficiency which result from superior design. These amenities, as well as the unique character of San Francisco, indicate some of the most important objectives for the downtown area.

More detailed considerations relating to aesthetics and amenities are:

a. General Formulation (By Professor Bogner. These considerations are derived from Professor Bogner's study input on Urban Design Aspects, the remainder of which appears in this working paper.)

(1) Aesthetic qualities may be accidental as the consequence of a fortunate natural growth of buildings in favorable landscape.

Zoning must control destruction of beauty by rampant growth.

(2) Aesthetic qualities may result from the creative efforts and the skills within the design and planning professions.

Zoning must be sufficiently imaginative and permissive to encourage progress and facilitate solutions to the complex urban problems.

(3) The downtown area is the heart of the city and its region. Within downtown are a series of districts and neighborhoods with individual character, specialized functions, and distinct problems.

The zoning study has to concern itself with the entity of downtown. The separation of Market Street, or any other district for special emphasis, should be balanced by equal

consideration of the problems of all downtown areas in relation to the needs of the city and region.

(4) The vitality of downtown depends to a large extent on the amenities it offers and the attraction it provides. San Francisco is in competition with other cities, and downtown business is in competition with that of other areas of the city and region.

San Francisco's zoning study should benefit from the achievements and experiences of other cities in their efforts to rebuild themselves without losing sight of its unique conditions of topography, geographic, and scenic location.

(5) The urban problems resulting from the automobile, crowding of population, and accumulation of obsolescense that blights land occur in all metropolitan areas. New York as the largest city, Boston and Philadelphia as two of the oldest cities, Houston as one of the newest, illustrate the extreme conditions that may possibly develop in downtown San Francisco.

The observation of problems in other cities and the relative success from cures being attempted provide a background of knowledge and experience for this study. Limits of density, standards for control of daylight, new uses of land, handling of pedestrian circulation can be planned on the basis of this background.

(6) Architecture and building technology offer new methods for the design and planning of buildings with consequent new problems in downtown areas (hundred story high buildings with a combined use for parking, offices, apartments, and retail stores; buildings erected on air rights over expressways for municipal parking facilities; etc., etc.).

A downtown study dealing with regulations for future zoning must consider the impact of architectural trends and the opportunity for improvement that progress holds in store. Building bulk and height regulations are affected by this.

(7) Downtown San Francisco presents great contrasts in the vitality of its various districts and neighborhoods. Combined with this is a great contrast in the density of land use and the value of land (compare the large areas of inadequately used land south of Market with the congested small area of land used in the Financial District).

(8) Solutions to parking and traffic are basic to the accessibility of downtown properties; they are essential to the economic strength of downtown.

The Downtown Zoning Study will have to incorporate traffic data expected to become available later in the study. Amenities and values of downtown property "locations" grow largely out of accessibility.

(9) The hills of downtown San Francisco present a unique problem in that the amenities of panoramic views from high points and the beauty of the skyline showing the hills are being diminished by the new high rise structures. Also, pedestrian circulation, vehicular traffic and building access demand special consideration on the steep hillsides.

The established height limits for the protection of vistas, floor area ratios that tend to push heights to excess in critical locations, building bulk that would produce objectionable obstructions or destroy the harmony or scale of the urban environment place demands for unique provisions before zoning.

b. Minor Formulation (Objectives listed from other miscellaneous sources)

(1) Preserve the present distinctive character and image of San Francisco as it is now evidenced in the downtown area;

(2) Provide for a changing character of development in San Francisco consonant with a larger and more densely built up metropolitan center;

(3) Provide more attractive entrances to the downtown area via the various entranceways;

(4) Maintain the separate attractive atmosphere and character of each of the varied functional areas of downtown San Francisco;

(5) Provide convenient and attractive pedestrian ways, including open spaces and plazas to allow pleasant circulation of people in the downtown area;

(6) Protect existing open spaces or proposed and planned open spaces from infringement upon their sunlight, air and view;

(7) Protect, where feasible, the existing buildings' access to sunlight, air, reflected light and view;

(8) Insure adequate light penetration to streets;

(9) Provide for pedestrian scale amenities throughout the downtown area in the form of landscaping, rest spots, places of assembly and variety in the forms, size and materials of urban open spaces;

(10) Protect historical and architecturally significant structures or areas and encourage their preservation and continued use;

(11) Provide for easy accessibility to the various functions to allow a functional variety in the downtown that is available with a minimum of movement;

(12) Provide for new growth areas that will encourage upgrading of development in certain parts of the downtown;

(13) Provide for flexibility in urban design by allowing the builder, developer and architect a wide choice in the form and shape of buildings and developments to create variety and diversity in the urban landscape;

(14) Lend prominence to important civic and institutional buildings, plazas or building groupings;

(15) Afford the citywide identity function that downtown has keynoted to make San Francisco one of the most renowned cities in the world.

5. ENCOURAGEMENT OF CONSTRUCTION, RECONSTRUCTION AND REMODELING

The major objective would be to encourage and permit new investment in downtown consonant with the notion of "best economic use" as the maximum use by the developer incurring the least diseconomies to surrounding property owners and the general community. Some of the factors relevant to this category are also found under Section 1 above, Efficiency and Strength of the Downtown Area. Other specific objectives would be:

a. Encourage new construction to replace obsolete space;

b. Encourage reconstruction and remodeling of existing space;

c. Encourage construction or reconstruction of differing types and sizes of spaces to meet the differing requirements of large owner-occupants, small owner-occupants and large or small tenants;

d. Minimize disincentives to new investment or reinvestment in buildings;

e. Afford economic construction and reconstruction on parcels of differing sizes and shapes;

f. Afford economic size, bulk and shape of buildings suitable for differing land values, locations, functions and orientations.

6. ESTABLISHMENT OF APPROPRIATE ZONING CONTROLS

The ultimate objective is to provide workable, readily understood, and desirable zoning controls that will reflect the objectives as stated above. More specifically:

a. Accentuate incentives rather than rigid restrictions;

b. State the controls in clear and understandable language;

c. Formulate the zoning objectives and controls with informed and participating citizens and citizens' groups;

d. Demonstrate possible effects of proposed controls through case studies and comparison when applicable to other cities' experiences;

e. Present zoning control alternatives to policy makers with alternate consequences related to key issues;

f. Relate zoning controls to the key goals and issues in the downtown and the city as a whole;

g. Coordinate zoning controls with other city and other public agency policies, plans and programs;

h. Establish a clear and firm expectation as to the kind and quality of controls and as to the continuity in their application to properties in downtown San Francisco.

B. GOALS AND ISSUES FOR THE FUNCTIONAL AREAS OF DOWNTOWN

1. THE FINANCIAL DISTRICT

The Financial District, center of headquarters, finance and administration, is the key area of Downtown San Francisco. It represents the base for certain other activities and establishes San Francisco as the managerial center of the Bay Area and the traditional financial center of the Pacific Region. The objectives for the Financial District include:

a. Maintain and improve the present locational and prestige advantages;

b. Encourage the continued growth of financial and administrative functions consonant with such advantages;

c. Attract new office and managerial functions;

d. Provide a compact district, easily traversed on foot;

e. Afford limited expansion of the financial area to provide new sites with differing locational characteristics;

f. Discourage the encroachment of the Financial District on Jackson Square, Chinatown, and Nob Hill;

g. Adapt the Financial District to the new locational requirements and potentials of the rapid transit stations on Market Street;

h. Encourage the integration with the Financial District of commercially designated properties in the Golden Gateway redevelopment project.

Some issues concerning the Financial District are:

a. The growth of the Financial District westward up Nob Hill and the designation of suitable bulk and transitional uses on the east slope of Nob Hill;

b. Concepts of city form such as an apex concept with the Bank of America tower at the center of a pyramid of structures, or a multi-apex concept running along lower California and Montgomery Street southwesterly along Market Street and westerly along California Street to Nob Hill;

c. Relationship of other office use districts such as the areas developing near the Civic Center and south of Market Street to the existing Financial District;

d. The effect of proposed office space in the Yerba Buena Redevelopment Project on the existing Financial District;

e. The effect of the Golden Gateway commercial redevelopment project on the extension of the Financial District to the east to Davis and eventually to Ferry Building Park.

2. THE RETAIL DISTRICT

Centering on Market Street from Third to Fifth Streets and in areas east and south of Union Square, the retail shopping district enjoys a favorable location. Its objectives include:

a. Maintenance of a compact area important to the convenience of the shopper on foot;

b. Easy access to peripheral parking areas;

c. Access to transit terminals;

d. Orientation toward high density population concentrations near downtown and to downtown employees and visitors;

Issues concerning the downtown retail area include:

a. The extension of the retail area eastward into the Financial District to serve an increasing working population;

b. The relationship of proposed retail uses south of Market to the core retail uses;

c. The effect of future Van Ness commercial development upon the core retail uses;

d. The effect of the expansion of tourist and specialty shop development in the northern waterfront area on the core retail development;

e. The attraction of new department store activity to the downtown core and the disposition of the present White House site.

3. THE HOTEL AND ENTERTAINMENT DISTRICT

This district is bounded generally by Geary, Powell, Market and Jones Streets with major hotels, theatres, restaurants and entertainment establishments. Some objectives in the hotel and entertainment area are:

a. To provide continued support for the theatrical activities on Geary Street;

b. To afford entertainment and cultural activities close in to the Retail and Financial Districts and near the existing large hotels;

c. To maintain a relationship between the Retail Shopping District and the tourist, entertainment and hotel areas;

d. To afford the opportunity for close-in concentration of these uses.

This area might be expected to feel the effects of a convention center south of Market or planned facilities in the Civic Center and on Nob Hill.

4. CHINATOWN

The entertainment and tourist activities in Chinatown center compactly along Grant Avenue and the east-west

streets between Stockton and Kearny. Stockton represents an important non-tourist Chinese community shopping center. Objectives in Chinatown include:

a. The preservation of the tourist attractions and shopping and entertainment facilities along Grant Avenue;

b. The maintenance of the cohesive ethnic community as long as this represents the desires of the Chinatown residents.

Some issues involved in the Chinatown area are:

a. Possibilities for redevelopment through private or public action of some of the crowded residential areas in Chinatown;

b. Height limits for the northeast slope of Nob Hill and height considerations along Grant Avenue relative to the preservation of the present character of that street;

c. Expansion of the Financial District into the present Chinatown area;

d. The disposition of the Hall of Justice site in the Portsmouth Corridor as a transitional use between Chinatown, the Financial District and the Broadway entertainment area.

5. THE NOB HILL SPECIAL USE AREA

On the crest of Nob Hill, this special district is surrounded by high density residential development. Some objectives are:

a. To maintain the Pacific Union Club and Huntington Square as landmarks of historical value;

b. To allow Huntington Square to provide integral open space that affords light and air and a sense of identity to the surrounding properties on Nob Hill.

The issues on Nob Hill include:

a. The general physical character of any non-residential uses and special design considerations for these non-residential uses;

b. The definition of transitional uses on the south slope of Nob Hill;

c. The movement of the Financial District up the east slope of Nob Hill;

d. Preservation of the residential character of the remainder of Nob Hill.

6. THE CIVIC CENTER

The Civic Center is defined by the Civic Center Development Plan adopted by the City Planning Commission in 1959. The objectives of the Civic Center are to provide a distinct and harmonious civic design, affording compactness both for reasons of convenience and to keep to a minimum the taking of private land for public development. Some of the issues in the Civic Center are:

a. Height limitations on buildings surrounding the Civic Center;

b. Harmony in design and bulk of buildings built directly in or around the Civic Center area;

c. Inclusion of added convention facilities, or their location alternatively south of Market Street;

d. The development of office centers around the Civic Center;

e. The development of Van Ness Avenue as a civic boulevard in the Civic Center area;

f. The relationship of the Civic Center to Market Street and the transit stations at Fulton and Van Ness;

g. The development of a full pedestrian mall on Fulton Street.

7. MIDTOWN AND OUTER MARKET STREET

This district represents the upper end of the total Market Street downtown district. The most significant aspects of Market Street concern the construction of rapid transit and underground local transit stations. Market Street is being studied by the Market Street Design Task Force in a coordinated program for the future development of public and private facilities. Major objectives of that program are:

a. To coordinate the future public facilities represented by the Bay Area Rapid Transit and Municipal Railway underground stations with future plaza development, local transit, street traffic, pedestrian flow and private development in the station areas;

b. The relocation of utilities, the design of materials and street furniture and the cost allocation for these various improvements.

Some issues concerning Market Street are:

a. The effect of transit stations on the intensity and type of development on adjoining and nearby properties;

b. The impact of the transit stations on pedestrian flow north of Market Street and south of Market Street;

c. The impact on pedestrian flow along Market Street;

d. Connection to private structures underground and above ground;

e. Setbacks and arcades along Market Street;

f. Height uniformity along Market Street and uniform building lines;

g. Vehicular traffic along Market Street;

h. Cross traffic on Market Street;

i. The entry of major flows of vehicles into the north of Market Area from the south of Market Area.

8. SOUTH OF MARKET

The Downtown General Plan breaks the South of Market area into four general functional areas: two of these are business and general service areas extending along Mission and Howard Streets, one east of Third Street and the other west of Fourth Street. In between these two is a special use area constituting the proposed Yerba Buena Center Redevelopment Project. The final South of Market functional area is for light industrial uses along Folsom and Harrison Streets west of Fifth Street. Some objectives for the South of Market area are:

a. To retain its use beyond the section directly influenced by Market Street as a service area performing subsidiary functions that support the downtown area but do not compete with the downtown functions;

b. To maintain the existing downtown activity centers north of Market or along Market Street, with the exception of the Financial District where some growth south of Market should be encouraged.

c. To define a strip of higher activity uses along Market Street, especially in relation to the rapid transit stations. The area from Mission Street north should be oriented toward the transit locations. The area from Howard Street south to the freeway should be more oriented toward freeway access.

Issues in the South of Market area include:

a. The future of existing residential buildings;

b. The future of the printing industry;

c. Attraction of new light industrial users;

d. The future of the wholesaling industry;

e. Social and community facilities south of Market Street;

f. Entranceways into the other downtown areas;

g. The effect of the proposed Yerba Buena project on the Financial and Retail Districts north of Market and upon the surrounding South of Market residential and commercial areas.

9. RESIDENTIAL AREAS IN THE DOWNTOWN

The residential areas indicated in the Downtown General Plan include the Midtown Residential Area on Jones and Leavenworth Streets and the Nob Hill Residential Area surrounding the Nob Hill Special Use District. Also included is the new Golden Gateway residential area. Objectives in the residential area are:

a. Preserve and maintain the dominant close-in living areas around Nob Hill;

b. Linking of the Golden Gateway residential area with the Telegraph Hill area outside of downtown to provide public facilities for this somewhat isolated area;

c. Improvement of the Midtown residential area based on its convenient location, flatness, and access to public transit.

C. BROAD ISSUES BEARING UPON DOWNTOWN ZONING

The following represents yet another formulation of issues to be considered in the Downtown Zoning Study. This list is somewhat incomplete and preliminary but attempts to bring together many of the broader issues which can be considered to bear ultimately upon zoning.

1. The C-3 Zoning District, as presently mapped, is too large and covers many different functional areas;

2. The regulations of the C-3 District are rigid without sufficient flexibility in their application to use, bulk, and parking aspects;

3. Relinquishment of parking as a requirement in the various downtown functional areas;

4. Infringement upon sunlight, air and views at public open spaces and upon private properties;

5. New building technologies and their effect upon zoning and building codes, especially in relationship to economic heights;

6. Visual and physical access to the waterfront;

7. Future of the Old Hall of Justice and the Portsmouth Corridor;

8. The ultimate disposition and effect of the Golden Gateway office and commercial land;

9. Effects of the ultimate disposition of Port Authority land for other than port needs;

10. Private uses and densities around the future rapid transit stations;

11. Ultimate routings of the Embarcadero Freeway and the Central Freeway extension;

12. The provision of new garage facilities by the Parking Authority;

13. Varying concepts of many functional districts isolating many activity nodes, or a few functional districts allowing for a more complex or inter-mixed uses;

14. Perimeter parking in belts at locations at

    a. Mission and Embarcadero
    b. East Bay Transit Terminal
    c. Seventh and Mission
    d. Ellis, Eddy, Taylor and Jones
    e. Civic Center Garage
    f. Ellis, Eddy, Hyde and Leavenworth;

15. Pedestrian malls free of vehicular traffic on

    a. Fulton Street
    b. Powell Street
    c. Grant Avenue north of Market
    d. Grant Avenue extended south of Market
    e. The Grant, Broadway and Columbus intersection
    f. Merchant Street
    g. Commercial Street
    h. Russ Street;

16. Rapid transit plazas and mezzanines at Fifth and Market, Seventh and Market;

17. General compactness in the downtown area to provide convenient pedestrian circulation, versus interruption of continuity by parking garages and other uses;

18. Compactness and ease of internal circulation versus open space and increased distances between points;

19. Restrictive design control to produce harmonious development versus maximum freedom in design and development control by the developers;

20. Encouragement of programs that take advantage of existing Federal grants and aids or other monetary assistance;

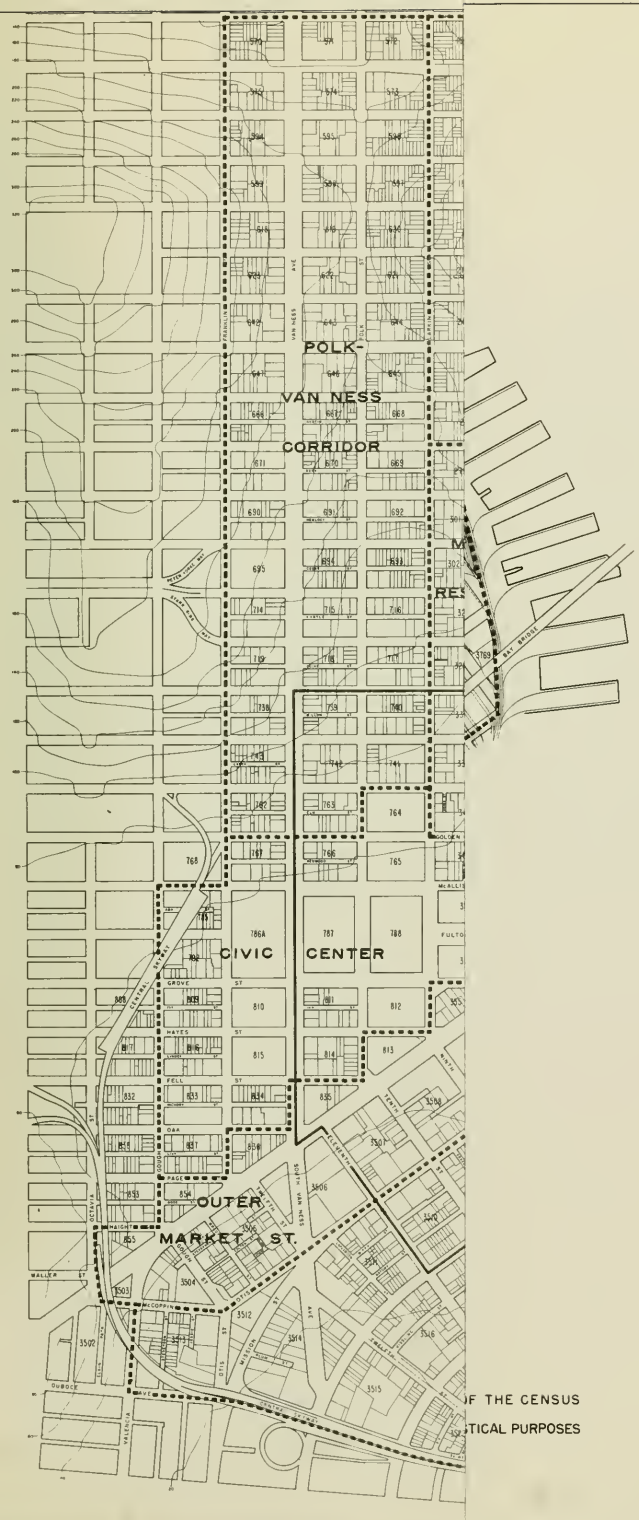
21. Combination or mix of auto and other transportation methods to serve trips ending in the downtown area.

APPENDIX

MAPS: STATISTICAL AREAS
FINANCIAL AND ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY

TABLES:

1. Building Space by Use Category for the Functional Areas, 1964
2. Building Space by Per Cent of Use Category for the Functional Areas, 1964
3. Total Employment by Dominant Space Use Category for the Functional Areas, 1964
4. Total Employment by Standard Industrial Classification System for the Functional Areas, 1964
5. Change in Occupancy of Selected Downtown Office Buildings, 1962, 1965
6. Real Estate Research Corporation Survey of Space in Major Office Buildings in Financial-Administrative Area, July, 1964
7. Per Cent Non-Residential Floor Space Built Since 1935 (1964)
8. Persons and Vehicles Crossing Cordon, 1947, 1959, 1965
9. Population by Number, Households, and Family Composition, 1950, 1960, 1970
10. Comparative Retail Sales Indicators, San Francisco Central Business District and Other Major Central Business Districts, 1963
11. Retail Sales: Central Business District, 1958, 1963
12. Per Cent Change in Retail Sales and Selected Services, 1954-1958, 1958-1963
13. Retail Sales in Central Business District as Per Cent of Total Sales, 1954, 1958, 1963
14. Selected Services, 1958, 1963
15. Wholesale Trade, 1958, 1963
16. Estimates of Gross Floor Space (Excluding Residential and Parking), BARTD (to 1975) and CRP (to 1977), by Functional Area
17. Projected Growth by Functional Area, Non-Residential Uses, 1963-1977, CRP
18. San Francisco Employment, 1947-1977
19. A Comparison of Office Space Projections for Downtown San Francisco
20. Financial-Administrative District Space Capacity Study: Analysis of Areas
21. Financial-Administrative District Space Capacity Study: Computation of Capacities
22. Major New Office Buildings Occupied, Under Construction or Announced, 1960 and Later



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C-3 AND ADJACENT DISTRICTS

STATISTICAL AREAS

SCALE IN FEET

SAN FRANCISCO
DEPARTMENT OF
CITY PLANNING

LADISLAS SEGOE
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DESIGN CONSULTANT
RUTH + KRUSHKHOV
RESIDENT CONSULTANTS

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C-3 AND ADJACENT DISTRICTS

STATISTICAL AREAS

LEGEND:

——— CENTRAL BUSINESS DISTRICT AS DEFINED BY U.S. BUREAU OF THE CENSUS

- - - - - - FUNCTIONAL AREAS TAKEN ON A WHOLE-BLOCK BASIS FOR STATISTICAL PURPOSES

SAN FRANCISCO
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CITY PLANNING

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RUTH + KRUSHKHOV
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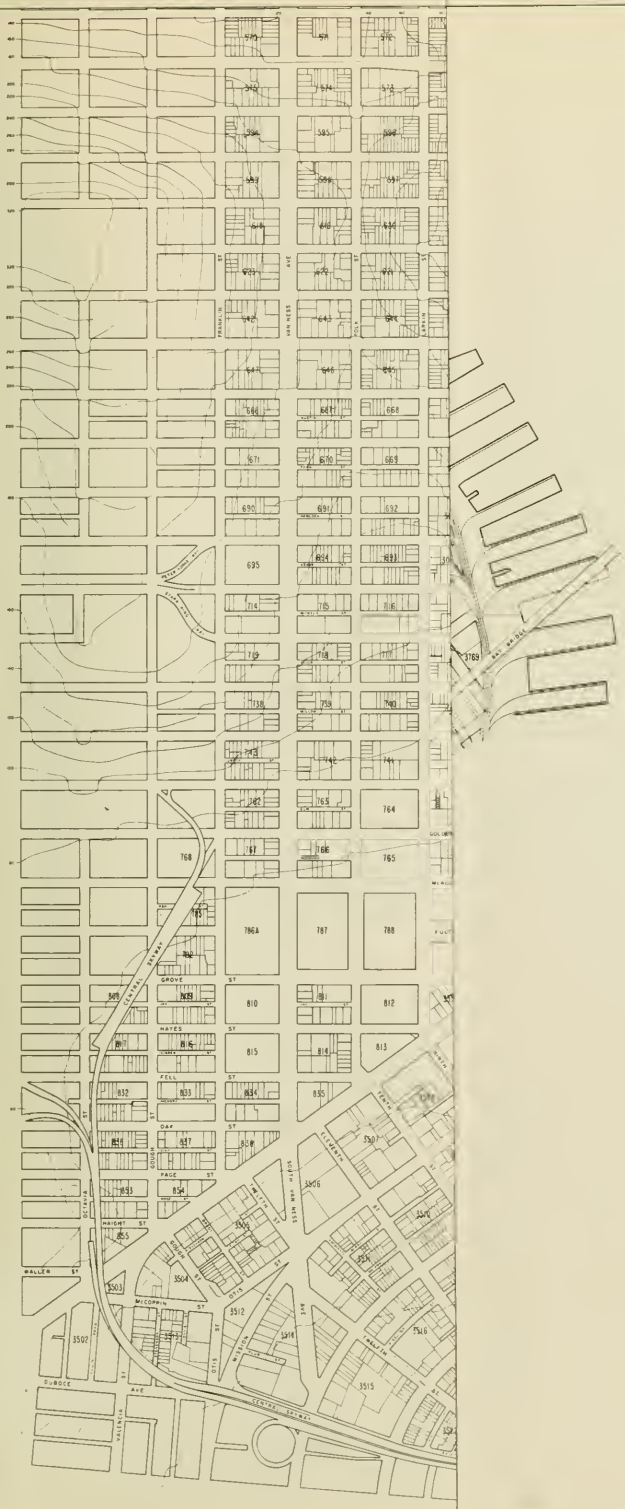

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C-3 AND ADJACENT DISTRICTS

FINANCIAL AND ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY

SCALE IN FEET
0 200 400 600 800 1000
NORTH

SAN FRANCISCO
DEPARTMENT OF
CITY PLANNING

LADISLAS SEGOE
GENERAL CONSULTANT
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C-3 AND ADJACENT DISTRICTS

FINANCIAL AND ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY

SCALE IN FEET

SAN FRANCISCO
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CITY PLANNING

LADISLAS SEGOE
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Table 1: BUILDING SPACE BY USE CATEGORY FOR THE FUNCTIONAL AREAS OF DOWNTOWN SAN FRANCISCO, 1964
Part I

	(Square feet of gross floor space)						
Building Use Category Code 1/	8	2, 9	10, 15	4	13	14	11
FUNCTIONAL AREA 2/	RESIDENTIAL/ COMMERCIAL 3/	RETAIL/ COMMERCIAL 3/	RETAIL/ OFFICES 3/	OFFICES	RESTAURANTS	HOTELS	GAS STATIONS
Financial - Administrative	57,500	573,500	462,500	16,951,000	317,500	957,500	-
Retail	46,000	3,351,000	1,107,000	3,785,500	90,000	1,215,000	-
Hotel - Entertainment	610,000	930,500	280,000	1,195,000	163,500	6,116,000	29,000
Chinatown Commercial	512,500	123,000	102,000	1,367,000	68,500	253,500	-
Jackson Square	7,500	255,500	29,500	372,500	22,500	22,500	-
Golden Gateway	-	-	-	32,500	-	-	-
Broadway - Kearny	331,500	138,000	71,000	101,500	249,000	142,500	-
Nob Hill Residential	381,500	120,000	7,500	110,000	-	-	3,000
Nob Hill Special	3,500	6,500	-	-	-	910,000	1,500
Midtown Residential	467,000	164,000	57,000	123,000	3,500	1,018,500	5,000
Civic Center	22,500	89,500	27,500	3,028,500	-	112,500	3,000
Outer Market Street	328,500	192,500	1,425,000	167,500	7,500	222,500	-
Polk - Van Ness Corridor	762,500	1,568,000	212,500	248,500	45,500	652,500	23,000
South of Market - East	100,000	790,500	352,000	1,224,500	44,500	340,000	3,000
South of Market - West	351,500	1,740,500	133,500	595,500	39,000	864,500	55,000
TOTAL	3,982,000	10,043,000	4,267,000	29,302,500	1,051,000	12,827,500	122,500

1/Each building was coded in a general use category.
2/Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.
3/ Mixed uses each occupying 1/3 or more of building.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 1: **BUILDING SPACE BY USE CATEGORY FOR THE FUNCTIONAL AREAS OF DOWNTOWN SAN FRANCISCO, 1964**
Part II

(Square feet of gross floor space)

Building Use Category Code [1] / FUNCTIONAL AREA [2]	12,16 PARKING	5,7 WAREHOUSE	1,3,6,18 INDUSTRIAL	17 GOVERNMENT	19 CLUBS, INST.	20 OTHER	TOTAL
Financial - Administrative	437,500	792,500	814,000	145,000	33,500	30,500	21,572,500
Retail	720,000	568,500	345,000	-	167,500	22,000	11,417,500
Hotel - Entertainment	811,500	290,000	88,500	452,500	665,000	87,500	11,719,000
Chinatown Commercial	310,000	27,500	330,000	3,500	112,500	15,000	3,225,000
Jackson Square	35,000	195,000	320,000	-	-	-	1,260,000
Golden Gateway	-	-	-	-	-	-	32,500
Broadway - Kearny	115,000	165,000	185,500	-	-	-	1,499,000
Nob Hill Residential	92,500	7,500	44,000	32,500	207,500	-	1,006,000
Nob Hill Special	-	-	-	-	65,000	-	986,500
Midtown Residential	104,000	113,500	17,000	-	36,000	7,500	2,116,000
Civic Center	525,000	14,500	-	1,343,500	127,500	-	5,294,000
Outer Market Street	50,000	378,000	318,000	-	27,500	15,000	3,132,000
Polk - Van Ness Corridor	142,500	761,000	168,000	35,000	312,500	85,000	5,016,500
South of Market - East	66,500	3,223,500	3,453,500	452,500	720,000	9,000	10,779,500
South of Market - West	151,000	3,413,000	3,516,500	717,500	131,500	158,500	11,867,500
TOTAL	3,560,500	9,949,500	9,600,000	3,182,000	2,606,000	430,000	90,923,500

1/ Each building was coded in a general use category.
2/ Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 2: BUILDING SPACE BY PER CENT OF USE CATEGORY FOR THE FUNCTIONAL AREAS OF DOWNTOWN SAN FRANCISCO, 1964

Building Use Category Code 1/ / FUNCTIONAL AREA 2/	8 Resid/ Comm. 3/	2,9 Retail/ Comm. 3/	10,15 Retail/ Office 3/	4 Office	13 Restaurants	14 Hotels	11 Gas Stations	12,16 Parking	5,7 Warehouse	1,3,6,18 Industry	17 Gov't.	19 Clubs, Inst.	20 Other	TOTAL
Financial - Administrative	1.44	5.71	10.84	57.85	30.21	7.46	-	12.29	7.97	8.48	4.46	1.29	7.09	23.73
Retail	1.16	33.37	25.94	12.92	8.56	9.47	-	20.22	5.71	3.59	-	6.43	5.12	12.56
Hotel-Entertainment	15.32	9.27	6.56	4.08	15.56	47.68	23.67	22.79	2.91	0.92	14.22	25.52	20.35	12.89
Chinatown Comm'l	12.87	1.23	2.39	4.66	6.52	1.98	-	8.71	.28	3.44	0.11	4.32	3.49	3.55
Jackson Square	.18	2.54	0.69	1.27	2.14	0.17	-	0.98	1.96	3.34	-	-	-	1.38
Golden Gateway	-	-	-	.11	-	-	-	-	-	-	-	-	-	.04
Broadway-Kearny	8.32	1.37	1.66	.34	23.69	1.11	-	3.23	1.66	1.93	-	-	-	1.65
Nob Hill Resid'l	9.58	1.20	0.18	.38	-	-	2.45	2.60	.08	.46	1.02	7.96	-	1.10
Nob Hill Special	.09	.06	-	-	-	7.09	1.22	-	-	-	-	2.49	-	1.08
Midtown Resid'l	11.73	1.63	1.34	.42	.33	7.94	4.08	2.92	1.14	0.18	-	1.38	1.74	2.33
Civic Center	.57	.89	.64	10.34	-	.88	2.45	14.75	.15	-	42.22	4.89	-	5.82
Outer Market St.	8.25	1.92	33.40	.57	.71	1.73	-	1.40	3.80	3.31	-	1.05	3.49	3.44
Polk-Van Ness Corridor	19.15	15.61	4.98	.85	4.33	5.09	18.78	4.00	7.65	1.75	1.10	11.99	19.77	5.52
South of Market East	2.51	7.87	8.25	4.18	4.24	2.65	2.45	1.87	32.40	35.97	14.22	27.63	2.09	11.86
South of Market West	8.83	17.33	3.13	2.03	3.71	6.74	44.90	4.24	34.30	36.63	22.55	5.05	36.86	13.05
TOTAL	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

1/ Each building was coded in a general use category.
2/ Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.
3/ Mixed uses each occupying 1/3 or more of building.
SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 3: TOTAL EMPLOYMENT BY DOMINANT SPACE USE CATEGORY FOR THE FUNCTIONAL AREAS OF DOWNTOWN SAN FRANCISCO, 1964

Building Use Category Code 1/ FUNCTIONAL AREA 2/	8 Resid./ Comm.3/	2,9 Retail/ Comm.3/	10,15 Retail/ Office3/	4 Office	13 Restaurants	14 Hotels	11 Gas Station	12,16 Parking	5,7 Warehouse	1,3,6,18 Industry	17 Gov't.	19 Clubs, Inst.	20 Other	TOTAL
Financial-Administrative	150	1,054	1,569	82,902	951	1,066	-	777	1,995	2,156	15	6	30	92,671
Retail	41	11,242	2,840	14,542	212	1,376	-	227	647	914	-	137	52	32,230
Hotel-Entertainm't	631	910	510	4,114	314	4,010	20	302	470	188	705	742	40	12,956
Chinatown Comml.	1,305	208	195	4,409	321	200	-	56	15	881	35	16	27	7,668
Jackson Square	4	291	61	794	29	25	-	16	153	703	-	-	-	2,076
Golden Gateway	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Broadway-Kearny	776	180	89	266	757	128	10	26	211	478	-	-	-	2,921
Nob Hill Resid'l	593	116	15	389	-	-	12	22	2	144	175	627	-	2,095
Nob Hill Special	2	16	-	-	-	1,869	6	-	-	-	-	50	-	1,943
Midtown Resid'l	538	175	131	821	6	460	8	56	61	103	-	129	4	2,492
Civic Center	14	133	12	13,115	-	143	18	25	111	-	2,303	122	-	15,996
Outer Market	4	263	3,056	177	2	161	4	33	298	368	-	2	35	4,403
Polk-Van Ness	929	965	358	743	126	511	73	41	539	174	37	115	6	4,617
South of Market - East	24	2,763	1,363	3,452	37	119	22	84	4,937	3,043	3,180	1,710	60	20,794
South of Market - West	258	2,412	222	1,104	114	610	166	186	4,597	6,575	1,967	159	206	18,576
TOTAL	5,269	20,728	10,421	126,828	2,869	10,678	339	1,851	14,036	15,727	8,417	3,815	460	221,438

1/ Each building was coded in a general use category.
2/ Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.
3/ Mixed uses each occupying 1/3 or more of building.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 4: Part I

TOTAL EMPLOYMENT BY STANDARD INDUSTRIAL CLASSIFICATION SYSTEM FOR THE FUNCTIONAL AREAS OF DOWNTOWN SAN FRANCISCO, 1964

S.I.C. Class	10-14 Mining	C Construction	D Manufacturing	27 Printing	E Transportation, Communication, Utilities	50 (Coded as 01-09) Wholesale	52,54,55 General Retail	53,56 57,59 CBD Retail	58 Eating and Drinking	60,67 Finance
FUNCTIONAL AREA 1/										
Financial-Administrative	175	1,257	10,678	1,784	12,518	3,218	306	1,366	1,469	29,916
Retail	6	35	983	228	2,217	499	290	12,351	1,074	2,366
Hotel-Entertainment	0	27	708	37	1,037	103	158	856	1,731	807
Chinatown Commercial	0	0	407	21	889	218	99	447	569	3,792
Jackson Square	0	175	193	612	19	302	22	67	69	195
Golden Gateway	0	0	0	0	0	0	0	0	0	0
Broadway-Kearny	0	23	267	431	42	155	206	207	1,109	47
Nob Hill Residential	0	17	265	8	17	15	148	54	59	33
Nob Hill Special	0	0	0	0	70	0	10	8	2	35
Midtown Residential	0	6	14	4	100	132	125	113	282	80
Civic Center	0	41	0	0	175	106	24	14	28	62
Outer Market	0	6	336	35	211	575	28	118	177	1,747
Polk-Van Ness	6	51	48	33	53	49	763	391	500	388
South of Market-East	35	714	2,815	1,361	5,102	3,413	151	432	90	357
South of Market-West	0	962	4,741	2,094	797	2,845	611	943	346	47
TOTAL	222	3,314	21,455	6,648	23,247	11,630	2,941	17,367	7,505	39,872

1/ Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 4: Part II

TOTAL EMPLOYMENT BY STANDARD INDUSTRIAL CLASSIFICATION SYSTEM FOR THE FUNCTIONAL AREAS OF DOWNTOWN SAN FRANCISCO, 1964

S.I.C. Class	70 Hotels	72 Personal Service	73,86,89 Misc. Bus. Service	75 Auto Repair	76 Misc. Repair	78,79 Theater & Amusements	80,81 Prof. Office	82,84 Insti-tutional	90-93 Govern-ment	Total All Classi-fications
FUNCTIONAL AREA [1]										
Financial-Administrative	692	406	18,075	230	117	27	4,146	45	3,898	90,323
Retail	1,028	808	4,376	143	50	84	3,137	8	2,237	31,920
Hotel-Entertainment	2,560	769	988	285	37	661	1,239	41	912	12,956
Chinatown Commercial	92	136	331	56	4	4	190	0	210	7,465
Jackson Square	10	17	340	20	0	6	27	2	0	2,076
Golden Gateway	0	0	0	0	0	0	0	0	0	0
Broadway-Kearny	22	71	277	40	4	10	8	2	0	2,921
Nob Hill Residential	0	148	675	96	4	0	379	2	175	2,095
Nob Hill Special	1,750	10	2	0	0	41	0	15	0	1,943
Midtown Residential	278	273	202	112	29	209	142	14	377	2,492
Civic Center	26	12	1,039	36	0	105	0	35	14,293	15,996
Outer Market	78	123	642	57	23	35	0	0	212	4,403
Polk-Van Ness	488	209	326	514	18	56	588	80	50	4,611
South of Market-East	97	103	1,234	100	143	64	37	0	4,505	20,753
South of Market-West	191	399	1,331	532	283	32	0	50	2,337	18,541
TOTAL	7,312	3,484	29,838	2,221	712	1,334	9,893	294	29,206	218,495

[1] Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 5: CHANGE IN OCCUPANCY OF SELECTED DOWNTOWN OFFICE BUILDINGS, 1962, 1965
(Square Feet of Building Space)

LOCATION OR TYPE	Total Competitive Rental Space		Per Cent Occupied		Non-Competitive Rentable[1]		Total Rentable Compet. & Non-Compet.		Per Cent Change, 1962-1965		
	1962	1965	1962	1965			1962	1965	Total Compet. Rentable	Non-Compet.[1] Rentable	Total Rentable Competitive and Non-Competitive
Government Occupied	--	--	--	--	1,604,147	2,631,903	1,604,147	2,631,903	--	64.07	64.07
Company Owned and Occupied	99,975	708,461	89.10	99.84	2,937,395	3,122,777	3,037,370	3,831,238	608.64	6.31	26.14
Medical Buildings	604,464	584,118	95.24	92.70	3,681	10,587	608,145	594,705	- 3.37	187.61	- 2.21
Large Financial	3,091,278	3,403,503	96.00	94.37	587,601	631,566	3,678,879	4,035,069	- 1.55	7.48	9.68
Medium Financial	875,356	837,038	97.43	96.84	162,127	95,937	1,037,483	932,975	- 4.38	-40.83	-10.07
Small Financial	207,131	265,331	93.43	86.55	59,848	62,900	266,979	328,231	28.10	5.10	22.94
Lower California St.	357,887	449,830	84.16	94.52	155,590	53,855	513,477	503,685	25.69	-65.39	- 1.91
Upper Market (6th & Market)	262,470	252,885	86.90	70.70	30,285	26,435	292,755	279,320	- 3.65	-12.71	- 4.59
Market St. (?rd & 5th)	926,416	854,984	87.79	87.87	30,654	91,478	957,070	946,462	- 7.71	198.42	- 1.11
New Montgomery & Mission	597,500	558,368	87.65	82.15	--	23,652	597,500	582,020	- 6.55	--	- 2.59
Market, Post, and Kearny	651,076	666,147	86.59	83.50	78,667	140,951	729,743	807,098	2.31	79.17	10.60
Lower Market St.	932,687	957,357	93.03	96.30	55,586	59,536	988,273	1,016,893	2.65	7.11	2.90
Retail District	480,012	502,689	93.06	92.10	51,609	48,609	531,621	551,298	4.72	- 5.81	3.70
TOTAL	9,086,252	10,040,711	92.72	92.16	5,757,190	7,000,186	14,843,442	17,040,897	10.50	21.59	14.80

1/ Building or portion of building occupied by owner or long term lessee.

SOURCE: Office Building Occupancy, Surveys of Membership: San Francisco Building Owners and Managers Association, Recapitulation of surveys of May 1, 1962 and May 1, 1965.

Table 6: REAL ESTATE RESEARCH CORPORATION SURVEY OF SPACE IN MAJOR OFFICE BUILDINGS
SAN FRANCISCO FINANCIAL-ADMINISTRATIVE AREA, JULY, 1964

1. PERIOD AND QUALITY	2. Total Rentable (sq.ft.)	3. Non-Competitive Rentable 1/ (sq.ft.)	4. Competitive Rentable (sq.ft.)	5. Government Occupied (sq.ft.)	Vacant (sq.ft.)	Vacant as % of Total Rentable (2)	Vacant as % of Competitive Rentable (4)
Total Financial-Administrative	9,570,124	3,021,082	6,549,042	117,246	289,276	3.02	4.42
Prior to 1918	4,378,996	1,130,088	3,248,908	91,124	255,502	5.83	7.86
Excellent	-	-	-	-	-	-	-
Good	1,350,801	211,452	1,139,349	4,126	45,451	3.36	3.98
Fair	2,552,386	900,157	1,652,229	85,858	105,422	4.13	6.38
Poor	475,809	18,479	457,330	1,140	104,629	21.98	22.87
1920-1941	2,341,495	723,186	1,618,309	4,170	19,484	.83	1.20
Excellent	554,662	-	554,662	-	1,187	.21	.21
Good	1,355,054	629,704	725,350	4,170	2,338	.17	.32
Fair	389,299	93,482	295,817	-	3,327	.85	1.12
Poor	42,480	-	42,480	-	12,632	29.73	29.73
1946-1963	2,849,633	1,167,808	1,681,825	21,952	14,290	.50	.84
Excellent	1,906,258	930,945	975,313	21,952	7,535	.39	.77
Good	578,830	217,503	361,327	-	2,000	.34	.55
Average	364,545	19,360	345,185	-	4,755	1.30	1.37

1/ Long-lease office space or owner-occupied.

SOURCE: Real Estate Research Corporation, Volume II, Data and Analysis, Land Utilization and Marketability Study, Yerba Buena Center Redevelopment Project, San Francisco, California, April, 1965, p. 19, Table 3, San Francisco Office Space Inventory by Periods of Construction and Quality, 1964.

Table 7: PER CENT NON-RESIDENTIAL FLOOR SPACE BUILT SINCE 1935 IN DOWNTOWN SAN FRANCISCO, 1964
Part I

Building Use Category Code[1] / FUNCTIONAL AREA[2]	1 Industrial	2 Industrial used for Commercial	3 Office and Industrial	4 Office	5 Warehouse	6 Shed	7 Warehouse & Office	8 Resid'l &[3] Commercial	9 Retail[3] Comm'l	10 Retail[3] Office	11 Gas Stations
Financial-Administrative	0	0	0	27*	0	0	0	0	0	0	-
Retail	0	-	0	1*	0	0	0	0	12*	0	-
Hotel-Entertainment	0	-	100	0	0	79	0	0	3*	0	95
Chinatown Commercial	-	-	-	62*	-	-	0	8*	0	46	-
Jackson Square	8	-	0	0	0	0	0	0	1	0	-
Golden Gateway	-	-	-	100	-	-	-	-	-	-	-
Broadway-Kearny	0	0	0	3	0	0	0	5	0	0	0
Nob Hill Residential	0	-	0	0	0	0	-	22*	6	0	100
Nob Hill Special	-	-	-	-	-	-	-	0	54	-	0
Midtown Residential	0	-	-	0	0	0	0	1	7	0	30
Civic Center	-	-	-	71*	0	-	0	0	0	0	50
Outer Market	32*	0	0	51*	16*	24	0	94*	9	26*	0
Polk-Van Ness	0	-	0	0	0	5	0	3	11*	5	28
South of Market-East	29*	0	0	16*	18*	-	38*	0	2	0	100
South of Market-West	11	52*	11*	22*	7*	32*	22*	18*	6*	17*	61*

1/ Each building was coded in a general use category.
2/ Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.
3/ Mixed uses each occupying 1/3 or more of building.

* Involves more than 30,000 square feet of space in this category.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 7: PER CENT NON-RESIDENTIAL FLOOR SPACE BUILT SINCE 1935 IN DOWNTOWN SAN FRANCISCO, 1964
Part II

Building Use Category Code[1] / FUNCTIONAL AREA[2]	12 Parking Lots	13 Restaurants	14 Hotels	15 Banks	16 Parking Garages	17 Gov't Offices	18 Special Industrial Plants	19 Institutions	20 Other	Total*
Financial-Administrative	0	0	0	0	59*	0	0	0	0	22
Retail	0	0	0	-	100*	-	0	16	0	11
Hotel-Entertainment	0	2	12*	35	58*	13*	-	0	0	12
Chinatown Commercial	0	0	0	0	95*	0	82*	67*	0	49
Jackson Square	0	0	0	-	79	-	-	-	-	4
Golden Gateway	-	-	-	-	-	-	-	-	-	100
Broadway-Kearny	0	13*	0	0	52*	0	0	0	0	7
Nob Hill-Residential	-	-	-	-	0	0	-	100	-	9
Nob Hill-Special	-	-	0	-	-	-	-	50*	-	4
Midtown Residential	0	0	0	100	0	-	0	0	0	2
Civic Center	0	-	0	-	97*	0	-	0	-	50
Outer Market	0	0	15*	58*	100	-	100*	0	0	47
Polk-Van Ness	0	8	68*	23	0	0	-	2	100*	15
South of Market-East	0	0	0	0	55	98*	100	98*	0	29
South of Market-West	4	23	3	-	5	85*	0	11	79*	17

1/ Each building was coded in a general use category.
2/ Functional Areas from 1963 Downtown General Plan adjusted to full block basis for data aggregation.

* Involves more than 30,000 square feet of space in this category.

SOURCE: Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 8:

PERSONS AND VEHICLES CROSSING CORDON,
DOWNTOWN SAN FRANCISCO, 1947, 1959, 1965.
TWELVE-HOUR AND AFTERNOON PEAK HOUR COUNTS

	1947 Count Entering & Leaving		1959 Count Entering & Leaving		1965 Count Entering & Leaving	
	7 A.M. - 7 P.M.		7 A.M. - 7 P.M.		Expanded 7 A.M. - 7 P.M. 1/	
	Number Entering	Number Leaving	Number Entering	Number Leaving	Number Entering	Number Leaving
Total Persons	586,732	556,529	671,462	645,176	733,862	697,976
Total Vehicles	228,745	220,940	316,000	304,846	376,400	359,846

	4:30 P.M. - 5:30 P.M.				4:30 P.M. - 5:30 P.M.				4:30 P.M. - 5:30 P.M.			
Persons by Mode	Persons Entering	Per Cent	Persons Leaving	Per Cent	Persons Entering	Per Cent	Persons Leaving	Per Cent	Persons Entering	Per Cent	Persons Leaving	Per Cent
Auto & Taxi	28,601	51.6	47,585	37.8	44,755	73.5	71,190	52.5	46,295	70.9	69,471	50.6
Trucks	3,413 2/	06.1	3,460 2/	02.7	1,945 2/	03.2	2,137 2/	01.5	1,388 2/	02.1	1,372 2/	01.0
Local Trans.	15,677	28.3	49,482	39.4	8,357	13.7	38,271	28.2	9,110	14.0	35,762	26.0
Out-Town Bus	1,400	02.5	4,843	03.9	1,326	02.2	10,000	07.5	3,209	04.9	15,975	11.7
Railways 3/	1,661	03.0	13,926	11.1	94	00.1	7,400	05.4	80	00.1	6,800	05.0
Total Pass.	50,752	91.5	119,296	94.9	56,477	92.7	128,998	95.1	60,082	92.0	129,380	94.3
Pedestrians	4,806	08.5	6,500	05.1	4,449	07.3	6,660	04.9	5,302	08.0	7,629	05.7
Total Persons	55,558	100.0	125,796	100.00	60,926	100.0	135,658	100.0	65,384	100.0	137,009	100.0
Vehicle Type	Vehicles Entering	Per Cent	Vehicles Leaving	Per Cent	Vehicles Entering	Per Cent	Vehicles Leaving	Per Cent	Vehicles Entering	Per Cent	Vehicles Leaving	Per Cent
Pass. Auto	18,167	79.5	30,721	85.6	27,193	89.4	43,716	92.3	32,350	92.0	47,584	93.8
Taxi Cabs	882	03.9	1,028	02.8	772	02.6	778	01.7	775	02.2	845	01.6
Trucks	3,103	13.5	3,145	09.5	1,768	05.8	1,943	04.1	1,261	03.6	1,249	02.5
Local Trans.	657	02.9	623	01.7	489	01.6	614	01.3	482	01.3	594	01.2
Out-Town Bus	45	00.2	128	00.4	170	00.6	304	00.6	341	00.9	453	00.9
Total Vehicles	22,854	100.0	35,645	100.0	30,392	100.0	47,355	100.0	35,209	100.0	50,725	100.0

1/Extrapolated from 10:00 A.M. - 6:00 P.M. data, using 1959 ratio to 7:00 A.M. - 7:00 P.M. total.
2/Truck volume times (1.1) truck factor 3/For 1947, includes Ferries
SOURCE: Downtown Parking and Traffic Survey, San Francisco Department of Public Works, Bureau of Engineering - Data for typical week day in July of each year.

Table 9: DOWNTOWN SAN FRANCISCO [1]

POPULATION BY NUMBER, HOUSEHOLDS, AND FAMILY COMPOSITION, 1950, 1960, 1970

CATEGORIES	AREA TOTALS	North and West of Central Business District	Central Business District North of Market	South of Market
POPULATION				
1950	101,543	50,817	35,020	15,706
1960	87,552	46,519	29,033	12,000
Net Change:				
Number	-13,991	- 4,298	- 5,987	- 3,706
Per cent	- 13.8	- 8.5	- 17.0	- 23.6
Trend 1970 [2]	76,166	42,835	24,069	9,262
HOUSEHOLDS				
1950	35,042	20,619	11,465	2,958
1960	55,855	24,485	23,018	8,352
Net Change:				
Number	20,813	3,866	11,553	5,394
Per cent	59.4	18.7	100.7	182.4
Trend 1970 [2]	109,301	30,366	46,212	32,723
FAMILIES				
1950	19,350	11,125	6,160	2,065
1960	13,832	8,784	3,706	1,342
Net Change:				
Number	- 5,518	- 2,341	- 2,454	- 723
Per cent	- 28.5	- 21.0	- 39.8	- 35.0
Trend 1970 [2]	10,163	7,056	2,229	878
UNRELATED INDIVIDUALS				
1950	49,330	18,420	21,155	9,755
1960	45,852	18,277	20,263	7,312
Net Change:				
Number	- 3,478	- 143	- 892	- 2,443
Per cent	- 7.1	- 00.88	- 4.2	- 25.0
Trend 1970 [2]	43,905	18,717	19,408	5,780
HOUSING UNITS	63,482	26,235	25,919	11,328

SOURCE: CRP Programming Area Analyses, from U.S. Census Data.

[1] Aggregation of census tracts to approximate Downtown Zoning Study Area.

[2] Trend data are not projections.

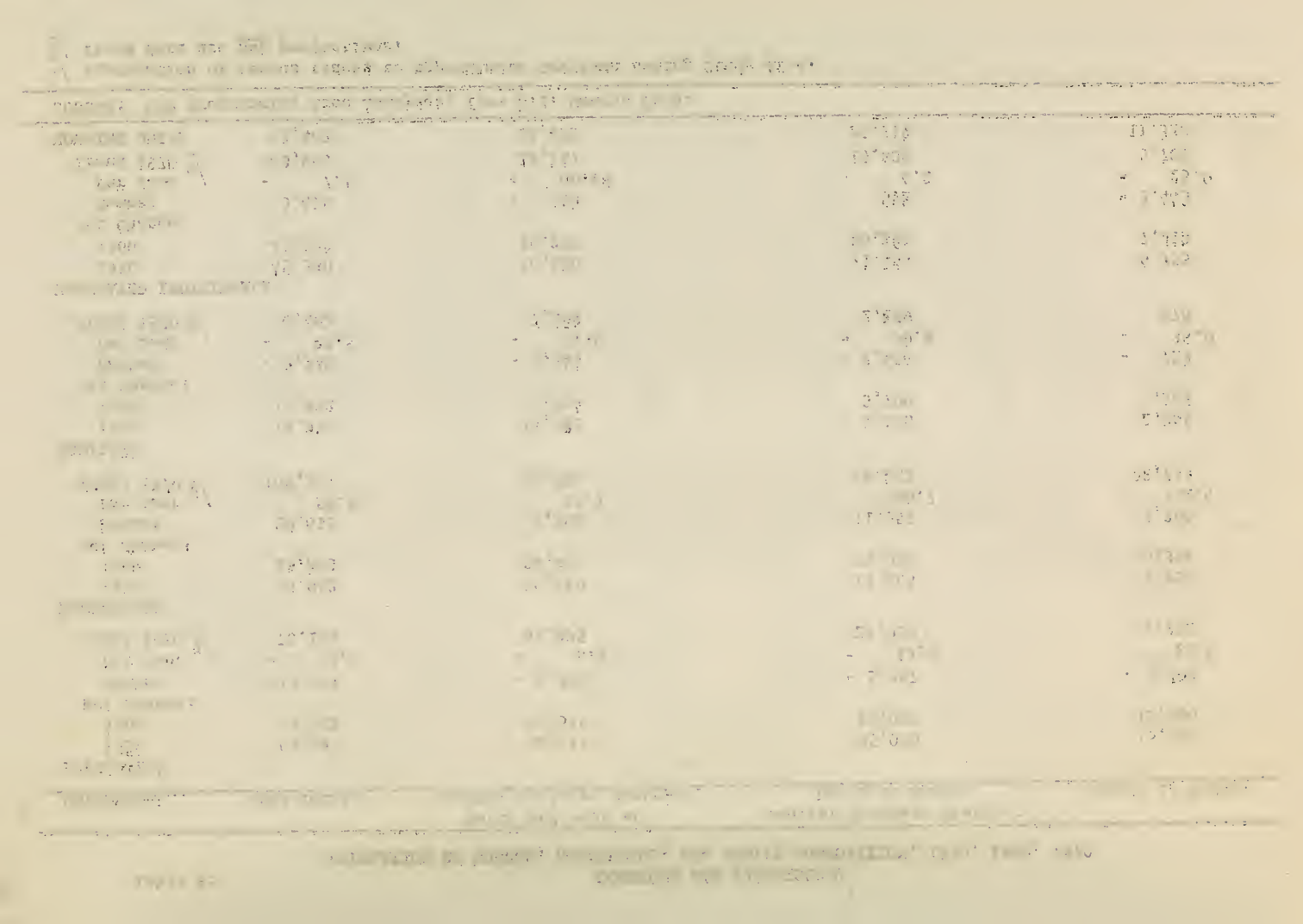

Table 10: COMPARATIVE RETAIL SALES INDICATORS, SAN FRANCISCO CENTRAL BUSINESS DISTRICT AND OTHER MAJOR CENTRAL BUSINESS DISTRICTS, 1963

Central Business District	National Ranking in Sales Size, 1963	CBD Sales as Per Cent of Metropolitan Area Sales, 1963		Per Cent Change in Sales of all goods, CBD	
		All Goods	Shopping Goods[1]	1958-1963	1954-1963
New York	1	15.5	27.9	- 2.2	+ 5.6
Chicago	2	7.6	18.9	- 3.3	- 4.7
Philadelphia	3	10.2	25.5	- 6.7	- 6.4
SAN FRANCISCO	4	11.0	24.1	+ 7.6	+19.1
Washington, D. C.	5	12.3	27.7	+ 4.4	+ 2.4
Boston	6	10.7	27.8	+ 0.9	- 3.0
Houston	7	18.5	26.3	- 0.1	- 4.0
Los Angeles	8	3.0	7.9	-12.9	-17.6
Cleveland	9	11.4	28.1	-14.6	-18.1
Atlanta	10	19.3	37.5	+ 1.4	+14.7
Pittsburgh	11	10.6	30.7	- 9.7	+ 0.6

1/ Shopping goods include general merchandise stores, apparel, accessory stores and furniture, home furnishings, equipment stores.

SOURCE: U.S. Bureau of the Census, Census of Business, 1963, Retail Trade: Major Retail Centers, Summary Report BC63-MRC-1

Table 11: RETAIL SALES: SAN FRANCISCO CENTRAL BUSINESS DISTRICT, 1958, 1963

SIC CODE	KIND OF BUSINESS	1958 Establishments	1958 Sales ($1,000)	1963 Establishments	1963 Sales ($1,000)
	TOTAL	2,192	454,520	2,094	489,000
52	Lumber, et cetera	31	3,227	20	1,237
53	General Merchandise	48	130,394	57	138,340
54	Food	172	24,540	187	27,485
55	Automotive Dealers	31	13,330	28	5,641
554	Gasoline	40	4,497	33	3,811
56	Apparel, Accessories	286	96,690	287	113,765
57	Furniture	106	32,432	112	30,400
58	Eating, Drinking	829	79,462	760	88,343
591	Drug Stores	49	10,660	49	13,901
59pt.	Other Retail	600	59,288	561	66,077
	SELECTED SERVICES				
7011	Hotels, Motels	260	40,550	235	50,752
783	Motion Pictures	27	6,772	27	6,013

SOURCE: 1963 Census of Business Major Retail Centers, San Francisco-Oakland, California SMSA.

Table 12: PER CENT CHANGE IN RETAIL SALES AND SELECTED SERVICES, 1954-1958, 1958-1963

SIC Code	Kind of Business	San Francisco-Oakland SMSA		San Francisco		Central Business District	
		54-58	58-63	54-58	58-63	54-58	58-63
	TOTAL	18.0	32.3	6.5	18.2	10.9	7.6
52	Lumber, bldg. supplies, etc.	8.0	4.3	10.1	-10.2	34.1	-61.7
53 part	General Merchandise	26.8	50.2	18.3	16.0	13.4	6.1
54	Food Stores	16.7	24.3	3.3	11.6	10.9	12.0
55 (ex. 554)	Automotive	14.2	55.1	-13.7	42.6	-10.0	-57.7
554	Gasoline Stations	31.3	29.0	23.0	14.1	19.0	-15.3
56	Apparel, Accessory Stores	10.4	24.2	6.0	19.1	6.1	17.7
57	Furniture	7.5	17.3	4.1	- 2.9	- 3.7	- 6.3
58	Eating and Drinking	19.2	25.7	9.1	15.9	14.6	-15.5
591	Drug Stores	27.0	37.4	10.2	18.6	1.3	11.2
59 (ex. 591)	Other Retail	21.7	22.3	16.6	11.6	25.6	30.4
	Selected Services						
7011	Hotels, Motels	18.2	46.3	19.6	29.2	22.9	25.2
783	Motion Pictures	- 9.8	NA	- 3.0	-17.6	-22.1	-11.2

Source: 1963 Census of Business, Major Retail Centers, San Francisco-Oakland, California SMSA.
1958 Census of Business, Central Business Statistics.

Table 13: RETAIL SALES IN SAN FRANCISCO CENTRAL BUSINESS DISTRICT (CBD) AS PER CENT OF TOTAL SALES IN SAN FRANCISCO AND SAN FRANCISCO-OAKLAND METROPOLITAN AREA (SMSA); PER CENT DISTRIBUTION OF RETAIL SALES, CBD AND SMSA; 1954, 1958, 1963

SIC Code	Kind of Business	CBD Sales as % of City Sales			CBD Sales as % of SMSA Sales			Per Cent Total Sales CBD			Per Cent Total Sales SMSA		
		1954	1958	1963	1954	1958	1963	1954	1958	1963	1954	1958	1963
	TOTAL	35.6	37.0	33.7	13.9	13.6	11.0	100.0	100.0	100.0	100.0	100.0	100.0
52	Lumber, Building Supply, etc.	12.1	11.9	5.1	2.3	2.5	0.9	0.7	0.7	0.3	4.3	3.9	3.1
53 part	General Merchandise	68.8	66.0	60.3	34.2	31.5	22.2	28.0	28.7	28.2	11.4	12.4	14.0
54	Food Stores	8.6	9.2	9.3	2.9	2.9	2.6	5.4	5.4	5.6	26.0	25.7	24.1
55 (ex.554)	Automotive	9.0	9.3	2.8	3.1	2.6	0.7	3.6	2.9	1.2	15.9	15.3	17.9
554	Gasoline Service Stations	8.3	8.0	5.9	2.1	2.0	1.3	0.9	1.0	0.8	6.0	6.6	6.4
56	Apparel, Accessory	80.4	80.4	79.4	40.9	39.5	37.4	22.2	21.3	23.3	7.5	7.3	6.9
57	Furniture, etc.	41.9	38.8	37.4	16.5	15.5	12.4	8.2	7.1	6.2	6.9	6.2	5.5
58	Eating and Drinking	41.5	43.5	41.8	21.7	21.7	19.2	16.9	17.5	18.1	10.8	10.9	10.4
59 591	Drug Stores	32.0	29.4	32.3	11.1	9.1	8.7	2.6	2.4	2.8	3.2	3.5	4.2
59 (ex.591)	Other Retail	47.2	50.8	50.7	20.0	21.4	19.5	11.5	13.0	13.5	8.0	8.2	7.6
	Selected Services												
7011	Hotels, Motels		65.2	63.1		51.0	43.7	NA	NA	NA	NA	NA	NA
783	Motion Pictures		47.6	51.2		NA	23.2	NA	NA	NA	NA	NA	NA

SOURCE: 1963 Census of Business, Major Retail Centers, San Francisco-Oakland California SMSA; 1958 Census of Business Central Business District Statistics, San Francisco-Oakland Area.

Table 14: SELECTED SERVICES IN SAN FRANCISCO, 1958, 1963

	Total Receipts ($1,000)				San Francisco as Per Cent of SMSA			
	1958		1963		1958		1963	
	S.F.	SMSA	S.F.	SMSA	Estab.	Rec.	Estab.	Rec.
TOTAL SELECTED SERVICES	429,475	738,121	603,034	1,159,088	41.68	58.18	36.90	52.03
Hotels, Motels	62,306	81,105	80,650	119,370	51.59	76.82	48.99	67.56
Personal Services	64,601	151,567	76,951	198,065	42.87	42.62	37.74	38.85
Miscellaneous Business Services	184,545	269,613	281,106	483,721	45.82	68.45	39.72	58.11
Auto Repair	43,070	87,314	74,185	154,603	32.80	49.33	30.19	47.98
Miscellaneous Repair Services	21,587	48,561	25,292	65,884	36.30	44.45	32.97	38.39
Motion Pictures	31,505	45,489	31,027	46,157	52.71	69.26	52.28	67.22
Amusement, Recreation (except Motion Pictures)	21,861	54,472	33,823	91,288	35.27	40.13	28.95	37.05

	Per Cent Change, 1958-1963					
	No. of Estab.		Tot. Receipts		Tot. Workers	
	S.F.	SMSA	S.F.	SMSA	S.F.	SMSA
TOTAL SELECTED SERVICES	- 8.56	3.28	40.41	57.03	19.05	28.76
Hotels, Motels	-23.28	-19.20	29.44	47.18	70.13	20.78
Personal Services	-13.02	-11.86	19.82	30.68	- 0.34	8.11
Miscellaneous Business Services	7.42	23.92	52.24	79.41	45.40	57.51
Auto Repair	6.43	15.63	72.24	77.07	19.39	21.51
Miscellaneous Repair Services	-17.95	- 9.67	17.16	35.67	- 0.84	5.56
Motion Pictures	- 7.35	- 6.59	- 1.55	14.68	4.46	10.63
Amusement, Recreation (except Motion Pictures)	-17.12	0.95	54.72	67.59	88.42	69.12

SOURCE: 1963 Census of Business, Selected Services, California.
1958 Census of Business, Selected Services, Area Statistics.

Table 15: WHOLESALE TRADE IN SAN FRANCISCO AND SMSA, 1958, 1963

CATEGORY	SAN FRANCISCO		SMSA		PER CENT OF CHANGE		SAN FRANCISCO AS PER CENT OF SMSA	
	1958	1963	1958	1963	S.F.	SMSA	1958	1963
Number of Establishments	3,029	2,991	5,268	5,804	- 1.25	10.17	57.50	51.53
Number of Workers	41,124	36,954	69,802	74,115	-10.14	6.18	65.92	53.31
Sales ($1,000)	4,915,978	5,278,574	7,458,001	9,901,465	73.76	32.76	58.92	49.86

SOURCE: 1963 Census of Business, Wholesale Trade, California
1958 Census of Business, Wholesale Trade, California Statistics

Table 16: ESTIMATES OF GROSS FLOOR SPACE (EXCLUDING RESIDENTIAL AND PARKING) BARTD (to 1975) and CRP (to 1977), BY FUNCTIONAL AREA (000's of sq. ft.)

Functional Area in Downtown San Francisco*	(1) 1965 per Downtown Zoning Study Data	(2) 1975 Estimate per BARTD	(3) 1977 per CRP (Column (1) + CRP Growth Projection)
Financial-Administrative	20,865	24,422	23,226
Retail	10,697	9,690	11,150
Hotel-Entertainment + Nob Hill Special Use	11,894	12,494	12,173
Civic Center	4,762	7,172	7,075
Outer Market Street	3,082	4,934	3,441
Golden Gateway	32	-	-
Chinatown Commercial	2,915	3,488	3,240
South of Market - East	10,713	9,817	10,601
South of Market - West	11,716	14,774	12,349

*Basic functional areas are as used in the Downtown Zoning Study, taken on a whole-block basis. The Community Renewal Program Commercial and Industrial Survey areas and the Bay Area Rapid Transit District zones do not coincide precisely with these functional areas, but were realigned for purposes of this computation.

Table 17: PROJECTED GROWTH BY FUNCTIONAL AREA[1/], NON-RESIDENTIAL USES, DOWNTOWN SAN FRANCISCO, 1963-1977, CRP

(000's Square Feet of Gross Floor Space)

FUNCTIONAL AREA	Parking	Used Car Lots and Garages	Public & Instit.	Utilities	Retail	Wholesale	Office	Light Industry	Medium Industry	Heavy Industry	Total Non-Res.
Financial-Administrative	301	8	971	- 4	- 80	- 6	3188	-148	-201		4029
Retail	136	- 7	94	- 3	-270		606	33			589
Hotel-Entertainment	288	- 50	223	- 2	-206		108	55			416
Chinatown Commercial	50	- 7	157		7		458	177			842
Jackson Square		- 9			12	4		-103	- 9		- 105
Broadway-Kearny	55	- 10	92		-153	- 1	269	- 75	- 12		165
Nob Hill Special	3	- 10	138				16	7			154
Civic Center	202	- 20	2250		29		21	33			2515
Outer Market			217		- 28		480				669
Polk-Van Ness	384	-208	1254	- 5	33		489	-168	-166		1613
South of Market-East	87	- 25	260	- 6	-223	93	632	-625	-218		- 25
South of Market-West	651	- 74	397	- 17	- 44	-436	524	920	-481	-156	1284
TOTAL	2157	-412	6053	- 37	-923	-346	6791	106	-1087	-156	12146

1/ The Commercial and Industrial Areas and Functional Areas are not coterminous and a selection was made to approximate each area in the case of overlap.

Note: Total columns may not add due to rounding.

SOURCE: Community Renewal Program, Forecasts of Future Space, LKL-24-A, February 18, 1965

Table 18: SAN FRANCISCO EMPLOYMENT, 1947-1977

July Estimates
(for entire City)

INDUSTRY	1947 [1]	1962 [2]	Per Cent Change 1947-1962	1977 [3]	Per Cent Change 1962-1977
Construction	26,900	20,800	- 22.7	19,400	- 6.7
Manufacturing	72,100	64,200	- 11.0	51,600	- 19.6
Light	30,600	30,700	+ .3		
Intermediate	16,200	13,200	- 18.5		
Heavy	25,200	20,300	- 19.4		
Transportation, Communication and Public Utilities	59,700	52,700	- 11.7	47,200	- 10.4
Trade	133,400	113,900	- 14.6	106,300	- 6.7
Wholesale	61,000	49,700	- 18.5	46,000	- 7.4
Retail	72,400	64,200	- 11.3	60,300	- 6.1
Finance, Insurance & Real Estate	37,600	54,700	+ 45.5	71,500	+ 30.7
Services	72,000	96,400	+ 33.9	121,100	+ 25.6
Business Services (Office Users)	30,300	57,800	+ 90.8	85,300	+ 47.6
Other Commercial	39,500	35,600	- 9.9	31,900	- 10.4
Auto Repair & Garages	2,200	3,000	+ 36.4	3,800	+ 26.7
Government	64,400	72,800	+ 13.0	83,300	+ 14.4
Other	--	1,100 [4]	--	--	--
TOTAL [5]	466,100	476,600	+ 1.0	500,400	+ 5.0

1/ Total is from Transit Survey; Detail is ADL est. using 127's as weighting device.
2/ From Labor Market Survey.
3/ From ADL forecasts.
4/ Presumably includes agriculture and mining.
5/ Detail may not add due to rounding

SOURCE: Arthur D. Little, San Francisco Community Renewal Program, Code LKL-16-4, June 15, 1964.

Table 19: A COMPARISON OF OFFICE SPACE PROJECTIONS FOR DOWNTOWN SAN FRANCISCO

DATE	STUDY	Projection Period	PROJECTION OF NET RENTABLE OFFICE SPACE (000's) Total	Average Annual	PROJECTION OF GROSS[1] OFFICE SPACE (000's) Average Annual
May 29, 1956	Market Analysis of Redevelopment Area "E" Real Estate Research Corp.	5 year period	1,500-1,800	250-300	)390)
April 29, 1958	Market Re-Analysis of Redevelopment Area "E" Western Real Estate Research Corporation.	1963-1968	1,690	338	439
August 27, 1963	Market Analysis and Land Utilization Study, South of Market Redevelopment Area D-1 Roy Wenzlick & Co.	1963-1975	7,500	650	825
February 18, 1965	Forecasts of Future Space Requirements, San Francisco Community Renewal Program Arthur D. Little, Inc.	1963-1977	6,800	370	485
April 7, 1965	Land Utilization and Marketability Study for Yerba Buena Center Redevelopment Project Real Estate Research Corp.	1965-1970	4,000	800	))815
		1970-1975	2,275	455	)

1/ Gross Office Space was calculated by assuming net equals 77 per cent of gross.

Table 20: FINANCIAL — ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY: ANALYSIS OF AREAS
Part I

AREA A [1]	No. of Parcels [2]	Land Area (sq. ft.)	Building Floor Space (sq. ft.) [3]	Floor Space in Offices (sq. ft.)	Existing F.A.R. [4]
All Properties	197	1,490,891	11,117,600	10,061,800	7.5
Non-susceptible properties	70	856,139	8,861,100	8,451,800	10.3
Susceptible properties					
1. Definite dev. proposal sites	17	92,720	223,000	173,500	2.4
2. Other sites, TOTAL	110	542,032	2,033,500	1,436,500	3.8
a. open land	8	23,228	-	-	0.0
b. 1-4 story buildings	68	315,083	917,500	570,500	2.9
c. 5-9 story buildings	34	203,721	1,116,000	866,000	5.5

1/ See map in Appendix entitled Financial and Administrative District Space Capacity Study for delineation of these areas.
2/ As designated on records of the Assessor.
3/ Excludes, for all areas, any floor space devoted to residential use.
4/ Ratio of building floor space (other than residential) to land area.

AREA B	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)	Existing F.A.R.
All properties	244	1,672,268	8,674,800	6,985,500	5.2
Non-susceptible properties, TOTAL	93	962,033	7,177,500	6,211,000	7.5
1. By initial criteria	46	538,711	4,706,500	4,546,000	8.7
2. 5-9 story buildings [5]	47	423,322	2,471,000	1,665,000	5.8
Susceptible properties					
1. Definite dev. proposal sites	5 [6]	175,808 [6]	33,500	27,500	0.2
2. Other sites, TOTAL	146	534,427	1,463,800	747,000	2.7
a. open land	5	34,159	-	-	0.0
b. 1-4 story buildings	141	500,268	1,463,800	747,000	2.9

5/ Contingently susceptible in this area.
6/ Includes 2 parcels in Golden Gateway Redevelopment Project with 151,145 square feet of land area.

Table 20: FINANCIAL — ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY: ANALYSIS OF AREAS
Part II

AREA C	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)	Existing F.A.R.
All properties	150	1,604,362	5,307,200	2,994,700	3.3
Non-susceptible properties, TOTAL	29	516,030	3,265,000	2,581,600	6.3
1. By initial criteria	11	366,290	2,370,000	1,986,600	6.5
2. 5-9 story buildings	18	149,740	895,000	595,000	6.0
Susceptible properties					
1. Definite dev. proposal sites	16 7/	387,573 7/	362,500	27,500	0.9
2. Other sites, TOTAL	105	700,759	1,679,700	385,600	2.4
a. open land	9	148,009	-	-	0.0
b. 1-4 story buildings	96	552,750	1,679,700	385,600	3.0

7/ Includes 2 parcels in Golden Gateway Redevelopment Project with 223,142 square feet of land area.

AREA D	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)	Existing F.A.R.
All properties	62	458,008	1,385,500	478,500	3.0
Non-susceptible properties, TOTAL	17	155,365	775,000	367,500	5.0
1. By initial criteria	4	64,968	257,500	180,000	4.0
2. 5-9 story buildings	13	90,397	517,500	187,500	5.7
Susceptible properties					
1. Definite dev. proposal sites	0	0	0	0	-
2. Other sites, TOTAL	45	302,643	610,500	111,000	2.0
a. open land	7	108,342	-	-	0.0
b. 1-4 story buildings	38	194,301	610,500	111,000	3.1

Table 20: FINANCIAL — ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY: ANALYSIS OF AREAS
Part III

AREA E	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)	Existing F.A.R.
All properties	203	1,262,140	3,785,800	1,619,500	3.0
Non-susceptible properties, TOTAL	48	411,135	2,316,800	1,529,500	5.6
1. By initial criteria	12	185,936	1,167,300	1,117,000	6.3
2. 5-9 story buildings	36	225,199	1,149,500	412,500	5.1
Susceptible properties					
1. Definite dev. proposal sites 8/	2	4,875	22,500	15,000	
2. Other sites, TOTAL	153	846,130	1,446,500	75,000	1.7
a. open land	41	289,200	-	-	0.0
b. 1-4 story buildings	112	556,930	1,446,500	75,000	2.6

8/ Buildings scheduled for removal in Yerba Buena Center Redevelopment Project, although non-susceptible by initial criteria.

Totals for Space Capacity Study Area (A, B, C, D and E)

	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)	Existing F.A.R.
All properties	856	6,487,669	30,270,900	22,140,000	4.7
Non-susceptible properties, TOTAL	256	2,900,702	22,395,400	19,141,400	7.7
1. By initial criteria	142	2,012,044	17,362,400	16,281,400	8.6
2. 5-9 story buildings in B	47	423,322	2,471,000	1,665,000	5.8
3. 5-9 story buildings in C, D, E	67	465,336	2,562,000	1,195,000	5.5
Susceptible properties					
1. Definite dev. proposal sites	41	660,976	641,500	243,500	1.0
2. Other sites, TOTAL	559	2,925,991	7,234,000	2,755,100	2.5
a. open land	70	602,938	-	-	0.0
b. 1-4 story buildings	455	2,119,332	6,118,000	1,889,100	2.9
c. 5-9 story buildings in A	34	203,721	1,116,000	866,000	5.5

Part III

Table 20: FINANCIAL – ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY: ANALYSIS OF AREAS
Part IV

Totals for Financial-Administrative Statistical Area (Bounded by Kearny and Washington Streets, The Embarcadero, Mission and Third Streets and including the Appraisers and U. S. Customs Buildings)

	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)	Existing F.A.R.
All properties	529	4,421,287	22,712,400	18,029,000	5.1

AREA F (Not shown on map. Includes all of Assessor's Blocks 242 and 257 and western portions of Blocks 241 and 258.)

	No. of Parcels	Land Area (sq. ft.)	Building Floor Space (sq. ft.)	Floor Space in Offices (sq. ft.)
All properties	53	334,206	685,500	423,500
Non-susceptible properties, TOTAL	13	212,997	536,500	423,500
1. By initial criteria	7	190,773	533,000	423,500
2. 5-9 story buildings	6	22,224	3,500 9/	0
Susceptible properties				
1. Definite dev. proposal sites	0	0	0	0
2. Other sites, TOTAL	40	121,209	149,000	0
a. open land	5	14,642	-	-
b. 1-4 story buildings	35	106,567	149,000 9/	0

9/ Excludes floor area in 11 buildings having a total of 159 dwelling units and no commercial or industrial floor space.

SOURCE: December, 1965 survey by Department of City Planning, and Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

TABLE 21: FINANCIAL — ADMINISTRATIVE DISTRICT SPACE CAPACITY STUDY: COMPUTATION OF CAPACITIES
(Space is expressed in gross square feet of offices)

PORTION OF SPACE CAPACITY STUDY AREA	Existing Total Space	Existing Space, non-Susceptible Buildings	Definite Development Proposal Sites, Net Gain in Space	OTHER SUSCEPTIBLE SITES					TOTAL SPACE CAPACITY		
				Land Area (sq. ft.)	New Space at 16:1 F.A.R. 1/	New Space at 10.3:1 F.A.R. 2/	New Space at 7.5:1 F.A.R. 3/	Space Lost in Susceptible Buildings	At 16:1 F.A.R. 1/	At 10.3:1 F.A.R. 2/	At 7.5:1 F.A.R. 3/
Area A	10,061,800	8,451,800	1,310,020	542,032	8,672,512	5,582,930	4,065,240	1,436,500	16,997,832	13,908,250	12,390,560
Area B 4/	6,985,500	6,211,000	1,484,092	534,427	8,550,832	5,504,598	4,008,203	747,000	15,498,924	12,452,690	10,956,295
Area B 5/	6,985,500	4,546,000	1,484,092	957,749	15,323,984	9,864,815	7,183,118	2,412,000	18,942,076	13,482,907	10,801,210
Area C	2,994,700	2,581,600	3,213,245	700,759	11,212,144	7,217,818	5,255,693	385,600	16,621,389	12,627,063	10,664,938
Area D	478,500	367,500	0	302,643	4,842,288	3,117,230	2,269,823	111,000	5,098,788	3,373,730	2,526,323
Area E	1,619,500	1,529,500	518,500 6/	133,764 7/	2,140,224	1,377,769	1,003,230	61,000 7/	4,127,224	3,364,769	3,990,230
TOTAL, AREAS A-E 4/	22,140,000	19,141,400	6,525,857	2,213,625	35,418,000	22,800,345	16,602,189	2,741,100	58,344,157	45,726,502	39,528,346
TOTAL, AREAS A-E 5/	22,140,000	17,476,400	6,525,857	2,636,947	42,191,152	27,160,562	19,777,104	4,406,100	61,787,309	46,756,719	39,373,261
Area F	423,500	423,500	0	121,209	1,939,344	1,248,453	909,068	0	2,362,844	1,671,953	1,332,568

1 F.A.R. presently permitted in C-3 Zoning District (land located within 125 feet of a street intersection is permitted in F.A.R. of 20:1).

2/F.A.R. of existing non-susceptible buildings in Area A.

3/F.A.R. of all existing buildings in Area A, including non-susceptible buildings, susceptible buildings and open land.

4/With 5-9 story buildings in Area B considered not susceptible.

5/With 5-9 story buildings in Area B considered susceptible.

6/According to Yerba Buena Center Redevelopment Project Plan.

7/Outside Yerba Buena Center Redevelopment Project Area.

SOURCE: December, 1965, Survey by Department of City Planning, and Commercial and Industrial Survey, Community Renewal Program, as modified for Downtown Zoning Study.

Table 22: MAJOR NEW OFFICE BUILDINGS OCCUPIED, UNDER CONSTRUCTION OR ANNOUNCED, 1960 AND LATER
DOWNTOWN SAN FRANCISCO

	BUILDING	GROSS FLOOR SPACE (000's of sq.ft.)	NET RENTABLE FLOOR SPACE (000's of sq.ft.) TOTAL	MAJOR TENANT	AVAILABLE TO OTHER TENANTS	OCCUPANCY DATE
Occupied	Bank of America, Data Processing Center	504	393	393	0	1960
	Wells Fargo (California Street)	200	150	135	15	1960
	Hall of Justice	602	500	500	0	1960
	International	270	211	40	171	1961
	Federal Building	1,219	978	978	0	1964
	Pacific Telephone (Folsom Street)	628	490	490	0	1965
	Standard Oil	283	221	221	0	1965
	Hartford	467	410	210	200	1965
	111 Pine	231	200	25	175	1965
	Hong Kong Bank	119	100	15	85	1965
	635 Sacramento	60	48	None	48	1965
	TOTALS	4,583	3,701	3,007	694	
Under Construction	Wells Fargo (Montgomery Street)	717	600	50	550	1966
	Fox Plaza	310 (office portion)	250	None	250	1966
	Alcoa	590	400	20	380	1967
	Bank of California	300	251	200	51	1967
	Insurance Center	137	125	25	100	1967
	TOTALS	2,054	1,626	295	1,331	
Announced; Permits Issued	Pacific Telephone (Pine St. add'n)	162	130	130	0	1967
	Bechtel	706	600	600	0	1967
	Matson	151	125	100	25	1967
	TOTALS	1,019	855	830	25	
Announced	Bank of America	1,484*				
	Standard Oil (add'n)	166*				
	Apparel Mart	300 (office portion)				
	Montgomery Block Site	268*				
	TOTAL	2,218				

*Permitted at Floor Area Ratio of 16:1, corner and through lot bonuses not included.
SOURCE: Department of City Planning Records, to January 1, 1966.